U.S. Coast Guard
Separations User Guide

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1.0 Introduction

This user guide provides step by step instructions for PSC, SPO, SPO Supervisor, and PPC Branch users of the Direct Access Separations component to terminate members from the United States Coast Guard.

2.0 Overview of Separation Transactions

The diagram below explains the different steps required for each type of separation and the user responsible for the step.

Separation Type	Sep Request	Sep Order	Sep Details	Approval	Sep Order Action/Reason	JOB Action/ Reason
Retirements						
AD/RSV Retirement - Officer, Warrant, Enlisted	Y - PSC	SPO completes	Term Type: Retirement Ret Auth:	SPO SUP	RWP/RWP	RWP/RWP
Disability (PDRL, TDRL)	Y - PSC	SPO completes	Term Type: Retirement Ret Auth: (disability)	SPO SUP	RWP/RWP	RWP/RWP
TERA	Y - PSC	SPO completes	Term Type: Retirement Ret Auth: TERA	SPO SUP	RWP/RWP	RWP/RWP
RSV RET-2 Age 60, to RET-1	No	SPO/PPC initiates	Term Type: Retirement Ret Auth: (age) RELAD Reason: 65? Empl Class: **RT-1**	Different UserID	RWP/RWP	RWP/RWP
Discharges						
Officer Resign/Revoke Comm	Y - PSC	SPO completes	Term Type: Discharge complete Discharge section/Officer	SPO SUP	TER/DSC	TER/DSC
Officer 2 X Passed Over	Y - PSC	SPO completes	Term Type: Discharge complete Discharge section/Officer	SPO SUP	TER/DSC	TER/DSC
ENL Discharge - Mandatory or Sep Pay authorized	Y - PSC	SPO completes	Term Type: Discharge complete Discharge section/Enlisted	SPO SUP	TER/DSC	TER/DSC
Routine End of Enlistment	No	SPO initiates	Term Type: Discharge complete Discharge section/Enlisted	SPO SUP	TER/DSC	TER/DSC
RELADS						
Regular mbr met AD oblig, RELAD to Reserves-SELRES/IRR	No	SPO initiates	Term Type: Release Reg Rgion: RSV Empl Class: IRR/SELRES	SPO SUP	TER/RLS	XFR/RLD
RSV Officer ends EAD	Y - PSC/OPM	SPO completes	Term Type: Release Reg Rgion: RSV Empl Class: IRR/SELRES	SPO SUP	TER/RLS	XFR/RLD
Rsv ENL End of Long-term AD, return to IRR	No	SPO initiates	Term Type: Release Reg Rgion: RSV Empl Class: IRR/SELRES	SPO SUP	TER/RLS	XFR/RLD
RSV on AD, 20 yrs svc, move **to RET-2**	No	SPO/PPC initiates	Term Type: Release Reg Rgion: RSV Empl Class: **RET-2**	SPO SUP	TER/RLS	XFR/RLD
RELAD/Retirement: Recalled RET-1, return to RET-1	No	SPO initiates	Term Type: **Retire/Resume Ret** Reg Region: RSV Empl Class: **RET-1**	SPO SUP	RWP/RWP	RWP/RWP on Empl Rcd 0
Recalled RET-2 RELAD, return to RET-2	No	SPO initiates	Term Type: Release Reg Rgion: RSV Empl Class: **RET-2**	SPO SUP	TER/RLS	XFR/RLD
Death	No	SPO initiates	Term Type: Death Line of Duty, Heroism	SPO SUP		TER/DEA

Figure 1: Separation Transactions

The Direct Access Separations application has two main components (pages) where a Separation may be updated: the **Separation Request**, and the **Separation Order**. Where the user initiates a separation depends upon the type of transaction.

All Separations will have a Separation Order that must be completed and approved before the transaction updates other records, such as JOB, Leave, Payroll, and the DD214.

2.1 Retirements

Retirement transactions usually require a Separation Request initiated by PSC. The exception is a Reservist retiring at age 60, which may be initiated with just a Separation Order.

2.2 Discharges

Routine, End of Enlistment discharges are initiated by the SPO, from the Separations Order component. Other Discharge types needing pay or other authorizations require a Separation Request to be initiated by PSC or Command. After the SPO completes all Separation Order pages, they submit the Discharge for approval by a SPO Supervisor.

2.3 RELADs (Release from Active Duty)

Most RELADs will be initiated as Separation Orders, by the SPO. The exception is a Reserve Officer released from Extended Active Duty: PSC-OPM1 will initiate a Separation Request for that action.

2.4 Deaths

A Death transaction will be initiated only as a Separation Order, by the SPO.

3.0 Separation Request

A Separation Request is created when a member requires an authorization to separate from the United States Coast Guard. It authorizes the action and any separation pay, disability, or heroism designations to the member.

- Information entered on the Separation Request will flow to the Separation Order. Below is an example of how to create a request for a Retirement.
- The Separation Authorization form is a standard Coast Guard document which may be generated (print, email) from the Sep Request.

3.1 Separation Request Business Process

- PSC enters Sep Request for most Separation Types; SPO typically does not enter.
- When PSC sets the Request Status to Approved:
  - The system creates a new Separation Order populated with Sep Request data.
  - TONO is created with an estimate – to be completed when Sep Order entered.
- Sep Order action is made available on Airport Terminal for SPO to select & work.
- PSC can generate PDF of the Separation Authorization form to send to member.
- PSC may Cancel or Amend a Sep Request once it's saved.

3.2 Creating a Separation Request

This section shows typical Separation Request values for a Retirement.

1. Access the Separation Request page by navigating from the Direct Access Portal Home page to the Separations pagelet. Click on the Separation Rqst/Authorization link.

Figure 2: Separation Request Link

2. Enter the EmplID on the search page and click Search. This will create the Separation Request for the member.

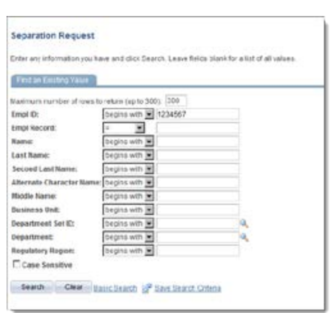


Figure 3: Separation Request Search Page

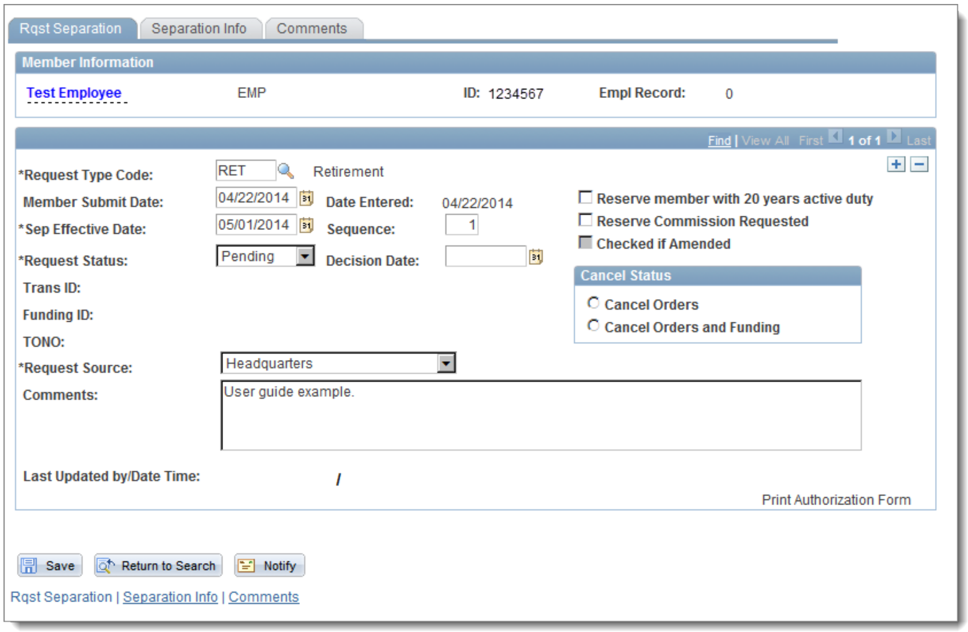


Figure 4: Request Separation Page

3. Enter the Request Type Code.

4. Enter the Member Submit Date.

5. Enter the Sep Effective Date.

6. Keep the Request Status of ‘Pending.’

7. Select the Request Source using the drop-down.

8. Enter Comments. These will display only on this page, not on the print Authorization.

9. Save the page.

10. The Last Updated by /Date Time field will populate with the user’s name and time stamp once the request has been saved.

11. Click on the Separation Info tab.

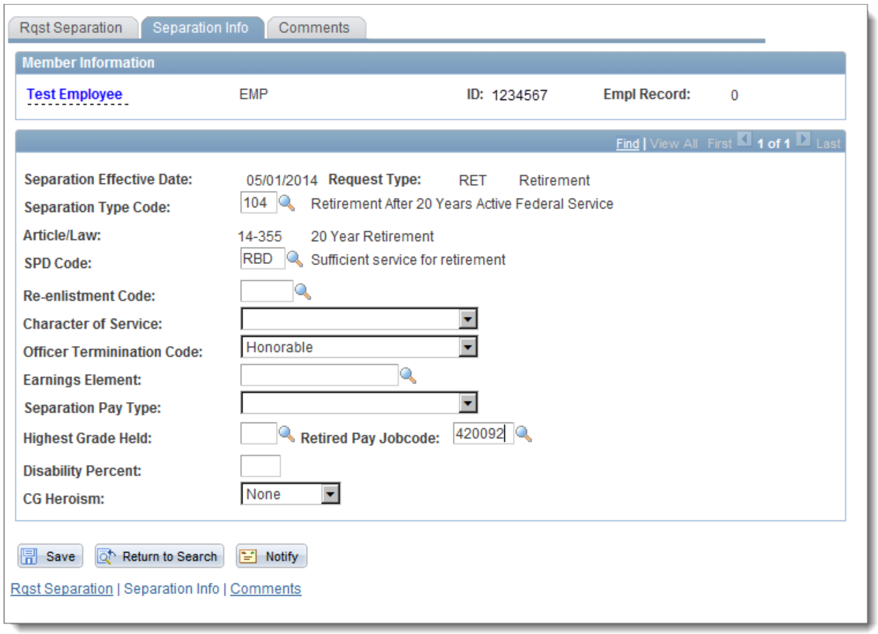


Figure 5: Separation Info Page

12. Enter the Sep Type Code.

13. Enter the Article/Law.

14. Enter the SPD Code.

If the member is Enlisted:

15. Enter the Re-Enlistment Code using the lookup tool.

16. Select the Character of Service using the drop-down tool.

If the member is an Officer:

17. Select the Officer Termination Code using the drop-down tool.

18. Select the Separation Pay Type, if authorized for this separation.

19. Select the Highest Grade Held, and Retired Pay Jobcode.

20. Click on the Comments tab.

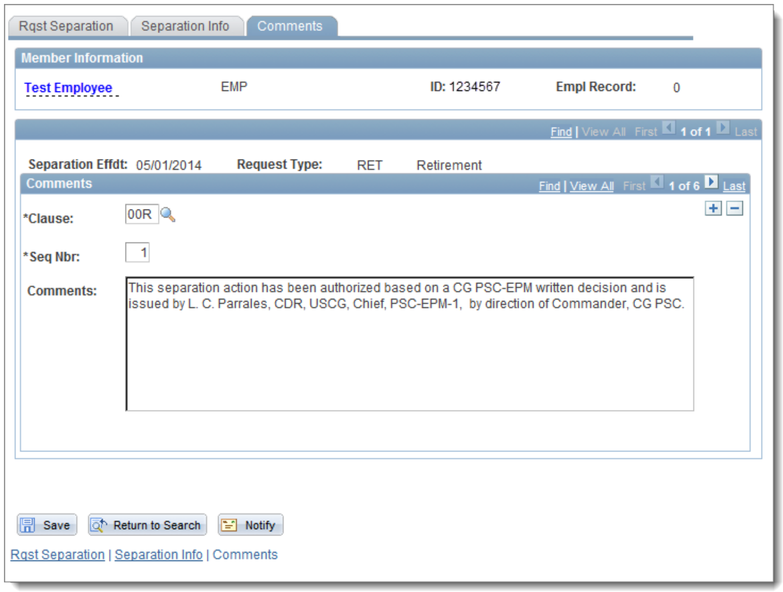


Figure 6: Comments Page

21. The Comments page is pre-filled with clauses configured by the SPD Code. Click on View All to display all clauses attached to the order.

These clauses will print on the Separation Authorization.

22. To enter a new clause, click +.

23. Select a Clause using the look up tool.

24. The Seq Nbr will auto generate. You may reorder the sequence as needed.

25. Enter any additional comments to the clause.

26. Click Save. The Separation Request is now ready for approval.

3.3 Approving a Separation Request

The user who originated the Separation Request, or another PSC user, may approve the Request on that page. Separation Requests are not 'routed' via workflow.

1. To approve the Separation Request, navigate to the Separation Rqst/Authorization page on the Separations pagelet.

Figure 7: Separation Request Link

2. Search for the request using the member's EmplID.

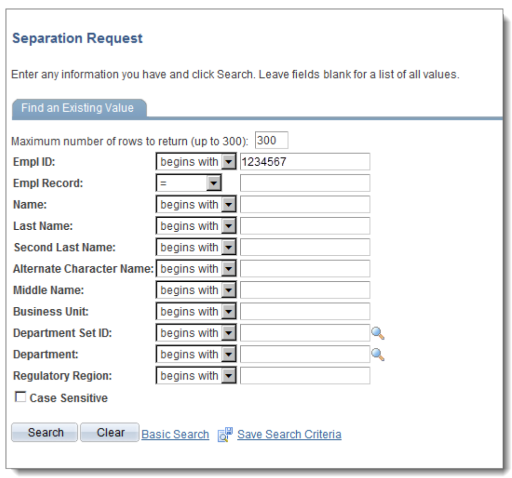


Figure 8: Search Separation Request

3. The Separation Request will display.

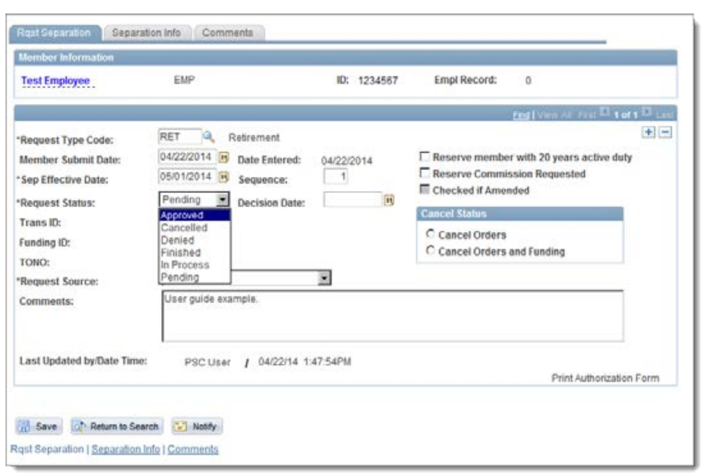


Figure 9: Separation Request Approval

4. Select Approved from the Request Status drop down.

5. Enter a Decision Date, usually the current date, using the calendar tool.

6. Click Save. The Trans ID (Order Number) for the Order will generate.

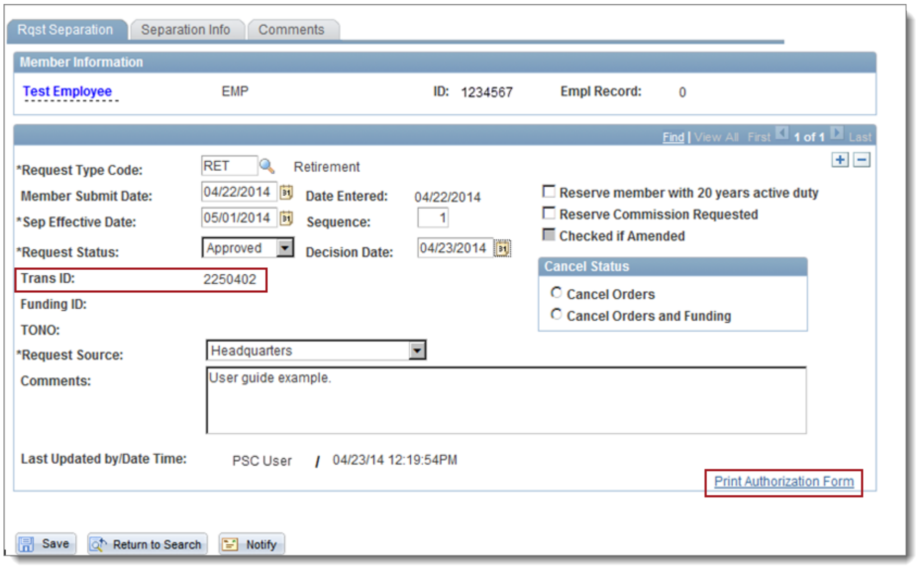


Figure 10: Approved Separation Request

7. Click the Print Authorization Form hyperlink to generate a PDF copy of the Separation Request. This form can be printed, emailed, or saved from the Adobe Acrobat window.

DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD System Generated	SEPARATION AUTHORIZATION			
Emplid: 1234567	Name: Test Employee	Rank: MK2	Effective Date: 2014-05-01	Member Submit: 2014-04-22
Deptid: 000379	Dept Name: CGC KEY BISCAYNE		Last Day of Active Duty: 2014-05-01	
Request Type: Retirement	Request Status: Approved		Request Source: Headquarters	
Entered By: 9876543			Date: 2014-04-23	

SEPARATION INFORMATION

Article/Law: 14-355 20 Year Retirement	
Sep/Ret Type: Retirement After 20 Years Active Federal Service	
DD214: RBD Sufficient service for retirement	
Character of Service:	Pay Type Code:

This separation action has been authorized based on a CG PSC-EPM written decision and is issued by L. C. Parrales, CDR, USCG, Chief, PSC-EPM-1, by direction of Commander, CG PSC.

Mbr's request for retirement is approved. This official separation authorization & mbr's preliminary retirement orders (issued 6 months in advance of the retirement date) will transmit the data required to complete the retirement from active duty orders. The servicing personnel office can prepare the DD Form 214 and pay/travel entitlements prior to the first day of retirement when enough advance notice is given. Therefore, to minimize avoidable administrative delays, please deliver mbr's retirement orders & a copy of this authorization as soon as possible.

As per Title 14, U. S. Code, Section 355, mbr shall detach from all duties effective the last day of previous month and proceed to their home of selection in connection with retirement in accordance with paragraph U5130, JFTR. The SPD Code for retirement (RBD) applies. Allowances, including travel for dependents, are authorized as per JFTR.

The CG Pay & Personnel Center (PPC-ras) will e-mail a retirement package to mbr's CG global email address 6 months prior to date of retirement. Questions regarding this retirement package, should be directed to PPC (ras) at 785-339-3415. (Additional info at www.uscg.mil/ppc/ras/) The retirement certificates & pin will be mailed to mbr's unit prior to retirement. Mbr should contact the Work-Life staff for a list of the dates for Transition, Relocation, and Retirement Seminars.

Please convey to member that on behalf of the Commander, CG Personnel Service Center, we wish to express our appreciation for his/her faithful service. May he/she have a fulfilling retirement and best wishes in future endeavors.

CG PSC-epm-1 authorizes the CO to grant permission for a retirement processing point (RPP) when the last PDS is INCONUS, AK, HI, & the requested RPP is a CG unit other than the mbr's last PDS or another CG unit within the same geographic area of the last

Figure 11: Authorization Form

3.4 Amending a Separation Request

Requests may be amended either before or after the Separation Order has been approved.

To perform an amendment:

1. Open the Separation Request.
2. Perform the needed update to the request page;
3. Ensure the Request Status is set to Approved.
4. Save the record.
5. System will flag the 'Checked If Amended' checkbox.
6. Changes will be populated on the Separation Order

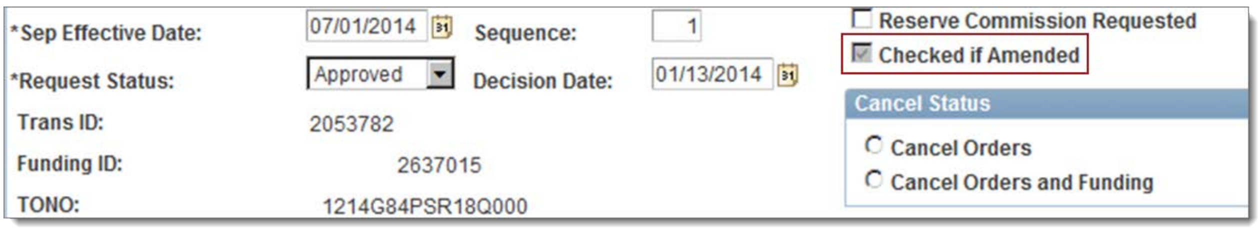


Figure 12: Amendment

3.5 Approving the Amended Sep Order

Any amendments must be approved by a SPO Supervisor, on the Separation Order. If the SPO Sup had previously approved the original order, the system will initiate a new approval cycle for the amended order.

3.6 Cancelling a Separation Request

Requests may be cancelled either before or after the Separation Order has been approved.

If a Separation Request has been created, but not approved, and no Order exists:

- Update the Request Status to Cancelled.
- Save the record.

The request will display as cancelled on the page and on Request reports. No actions will occur on an order, since it doesn't exist yet.

If the Separation Request has a corresponding Order, you must initiate the Cancel from the Separation Request page.

- Update the Request Status to Cancelled.
- Update the Cancel Status box to either Cancel Orders, or Cancel Order and Funding.

Below are scenarios for cancelling Orders that were initiated by a Separation Request.

Scenario 1: Separation Request created; Separation Order created – in **Authorized** status. PSC cancels Separation Request. Sep Order is automatically cancelled.

Scenario 2: Separation Request created; Order created –in **Ready** status.

PSC cancels Separation Request, contacts SPO to Cancel Order.
SPO initiates Cancel Order process, submits for Approval.
SPO Sup must approve cancelled Order.

Scenario 3: Separation Request created; Order Approved & processed to JOB –in **Finished** status:

Cancelling the Order will also remove the JOB row for the Separation.
SES must manually clean up any Leave or Global Payroll information.

Please see the Cancelling an Order section for more information.

4.0 Completing Separation Orders Created from a Separation Request

When a Separation Request is approved, the system generates a new Separation Order and pre-fills the fields with values from the Separation Request. The SPO will open the Separation Order from the Separations pagelet and complete all other details.

4.1 Separation Order Business Process:

- The SPO completes the Order information across multiple pages (tabs) of the Order:
  - Travel (including Terminal Leave and Dependents Authorized)
  - Notes
  - Leave disposition
  - Submit for Approval.
- The user may Save the Order at any time and return to continue updating it, until it is submitted for approval.
- SPO may begin work on the DD214 during this time.
- SPO submits the Order for SPO Supervisor approval.
- SPO Supervisor searches My Requests for the Separation, opens and Approves the Order.
- Once the order is Approved, its status is set to Ready.
- An Order may be Amended at this point.
- A few days before the Separation Date, a batch process writes the JOB row for the separation. The JOB Action/Reason are preset by the Separation Type code.
- Any changes needed to the Separation Order after this point require a Cancel Order.

4.2 Search for a Separation Order (SPO)

1. Access the Separation Orders page by navigating from the Direct Access Portal Home page to the Separations pagelet. Click on the Separation Orders link.

Figure 13: Separation Orders Link

2. Search for the Order by EmplID.

4.3 Separation Details Page

1. The Separations component opens, displaying the Separation Details page.
   The top of the page displays a 'header' which will appear on all other tabbed pages of the Order. The TransID is the unique order identifier.

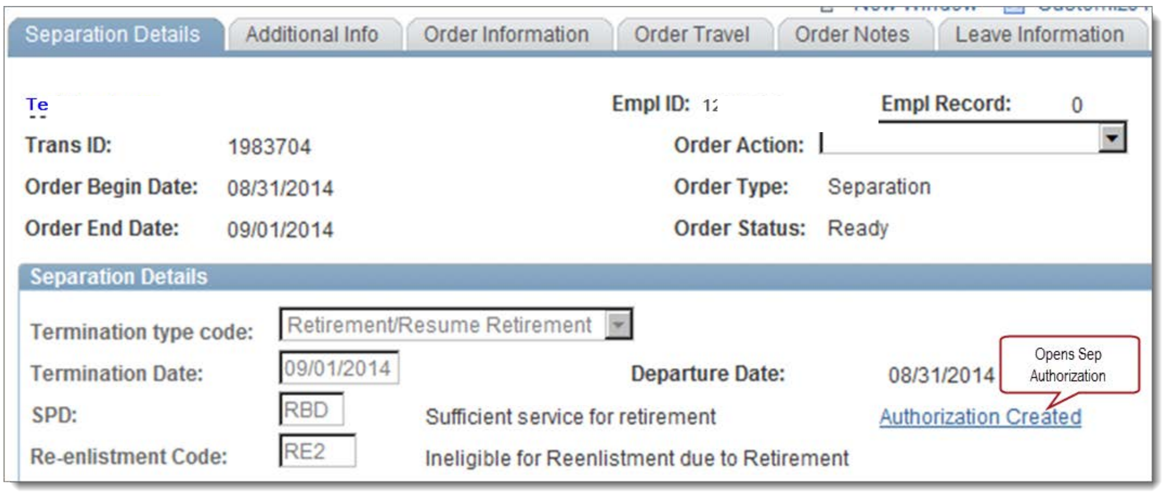


Figure 14: Separations Details Page

2. If the Authorization Created link is blue, a Separation Request was created prior to the order. Click the link to open the Separation Authorization form.
   Note: If no Separation Request was created, the text will be black, with no link.

3. SPO users may not change any fields on the Order page that were pre-populated from a Sep Request.

4. Select the Retirement Authorization code, if it is not already populated.

5. Depending on the type of Separation, complete fields in the Retirement, RELAD, Discharge, or Death section. Click on the blue bar to open each section.

4.4 Order Travel Page

1. Click on the Order Travel tab to enter details of the member's final travel.
   The Travel Orders section contains 2 rows: Seq Nbr 1 – the Depart row; and Seq Nbr 99 – the Report row.

2. Click View All to see and update both rows.

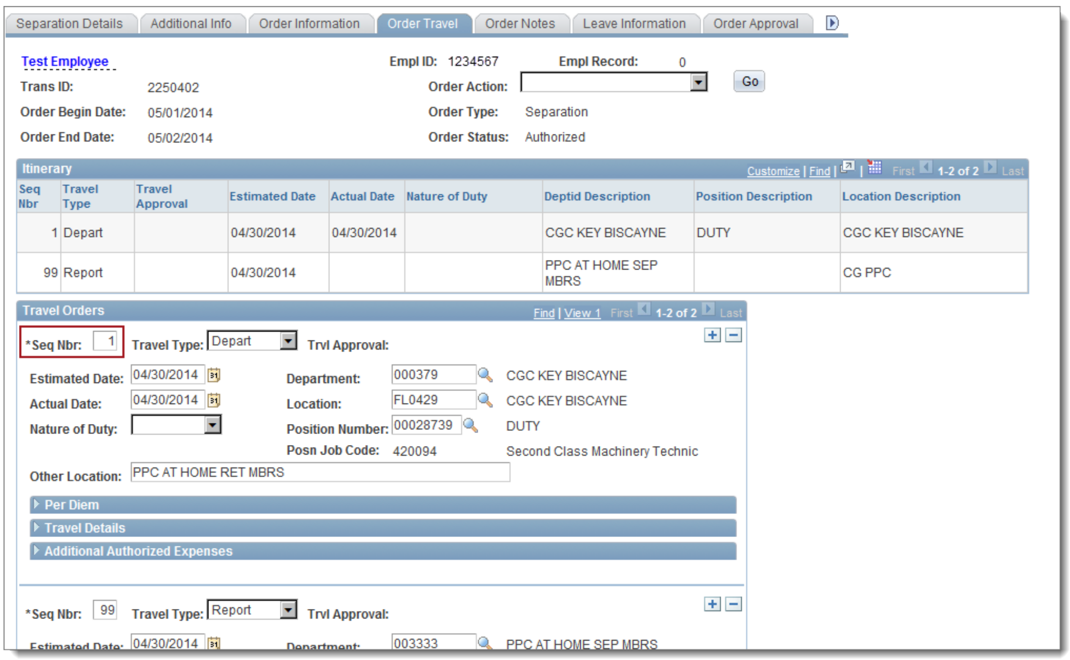


Figure 15: Order Travel

3. In the Seq Nbr 1 section, the Estimated Date is pre-filled, based on the Separation type. Enter the Actual Date of Departure (typically the last date of work.).

4. Select the Nature of Duty 'Separations' from the drop down if it is not already defaulted.

5. The Department, Location and Position Number of the Depart row will default from the current Job row.

6. Expand the Travel Details Section and Additional Authorized Expenses sections.

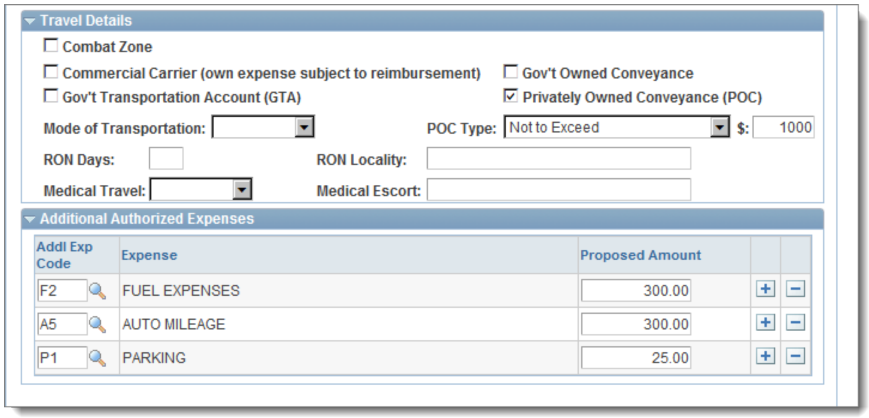


Figure 16: Travel Details & Additional Authorized Expenses

7. If the member will incur reimbursable travel expenses upon separation, complete the appropriate Travel Details. .

8. If you need to add specific Additional Expenses and Amounts, click [+] and use the look up tool to select an Expense Code. Enter the Proposed Amount of the expense.

9. Complete the **Report** row of travel: Seq Nbr 99. Typically, this row does not have travel expenses.

10. Select 'Separation; from the Nature of Duty drop down.

11. Verify the Department reporting to after the Separation. This is typically 'Home' 003333. For IRR and SELRES duty, select the appropriate department.

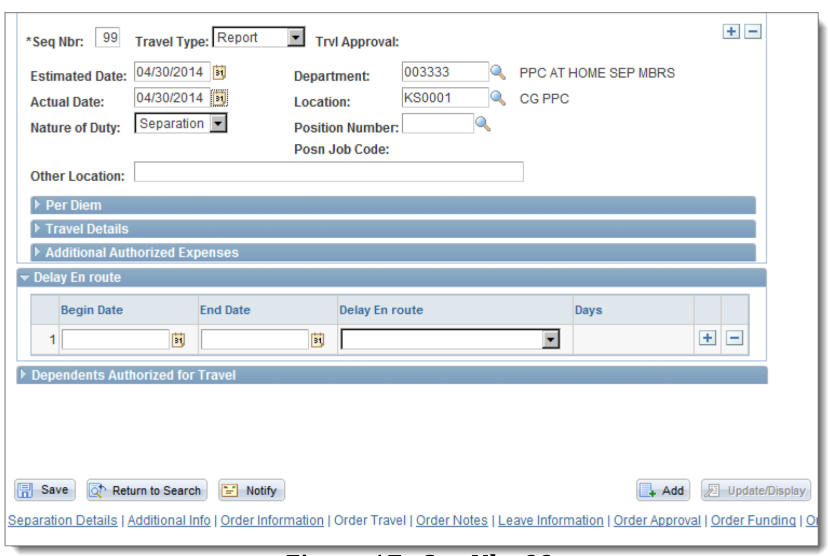


Figure 17: Seq Nbr 99

12. Enter a Position Number only if the member is going to SELRES.

13. Click to open the Delay En Route section to specify Terminal Leave. You may add new rows for additional delay types.

14. Enter the Begin Date of leave.

15. Enter the End Date; for Terminal Leave, this date must equal the Order End Date.

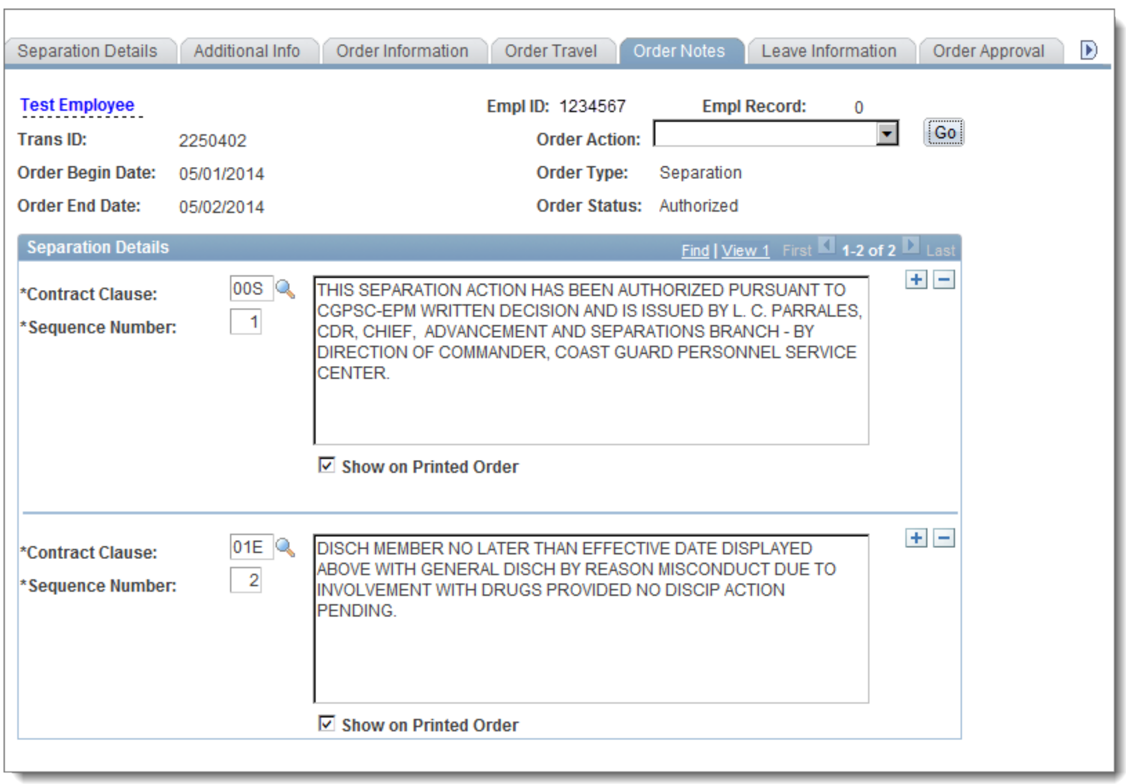
16. From the Delay En Route drop down, select the leave type.

17. Click Save. The Days for that leave type will populate.

18. Note: any Terminal Leave entered will also display on the Leave Information page.

4.5 Adding Order Notes

1. Click on the Order Notes tab. Order Clauses do <u>not</u> automatically populate; the SPO must enter appropriate clauses for the separation.



<u>Figure 18: Order Notes</u>

2. Select a Contract Clause using the lookup tool. (Although the field label is 'Contract', all types of clauses are stored together, so Order Clauses may be found in the lookup.)

3. Enter 1 for the Sequence Number.
4. Click + to insert an additional row.

5. Select a Contract Clause.

6. Enter 2 for the Sequence Number. You may change the sequencing of the Order Notes, as you want them to display on the printed order. Each clause must have a sequence number.

7. To display clauses on the printed order, mark the Show on Printed Order check box for each clause.

8. Click Save.

4.6 Leave Information Page

Since any Terminal Leave request is entered on the Order Travel page, the Leave Information page displays balances. The only leave you may enter on this page is carryover leave.

1. Click on the Leave Information tab.

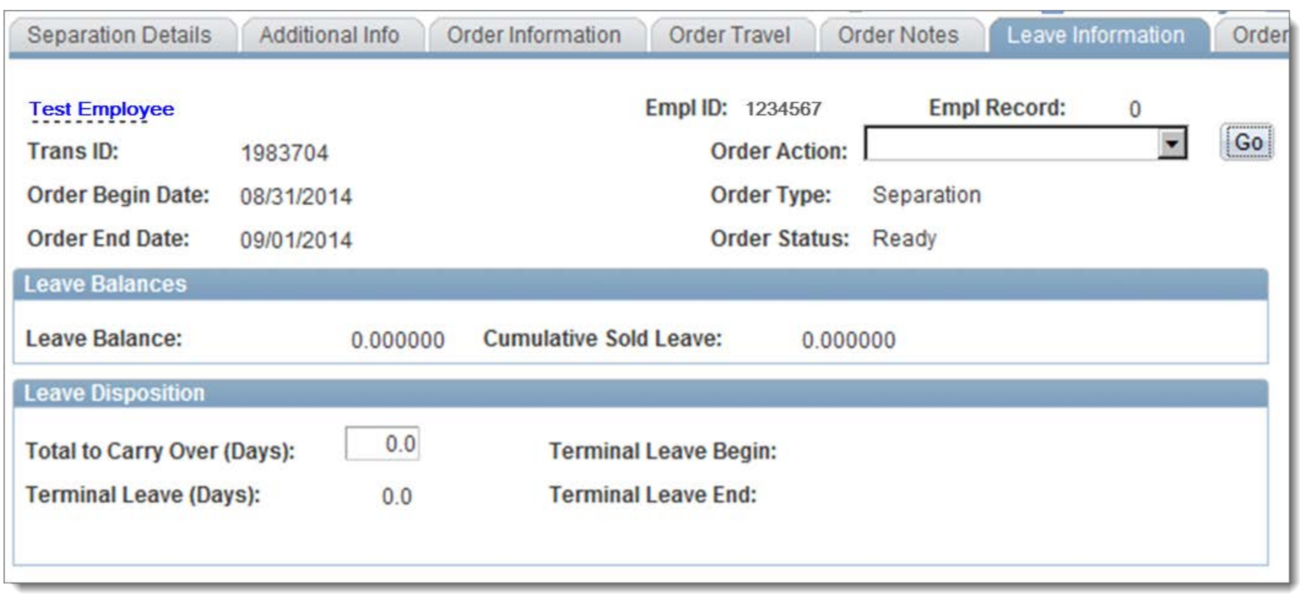


Figure 19: Leave Information

2. The **Leave Balance** reflects the member's accumulated leave balance as of the current pay/absence calendar. It does not factor in future leave requests that have been approved beyond current month

3. **Cumulative Sold Leave** displays total days of leave the member has previously sold.

4. Enter **Total Carry Over** if the member requests and is eligible to 'store' leave. This number of days will be subtracted from the leave available to sell.
5. The **Terminal Leave Days** will reflect the amount of days entered as final leave, in the Delay En Route section of Order Travel. Terminal Leave may only be updated on that page, then it will refresh here. The Begin and End dates reflect the leave request dates that were entered on the Travel page.

6. Any leave balance that remains after Terminal Leave is taken and Carry Over is stored shall be 'sold' and distributed to the member in the final pay.

4.7 Order Funding (TONO)

This page of the Order displays the Travel Order Number (TONO) and Line of Accounting data associated to this order.

After the order has been approved, the system automatically generates a new TONO number and Line of Accounting for the order. This will display on the Order Funding page.

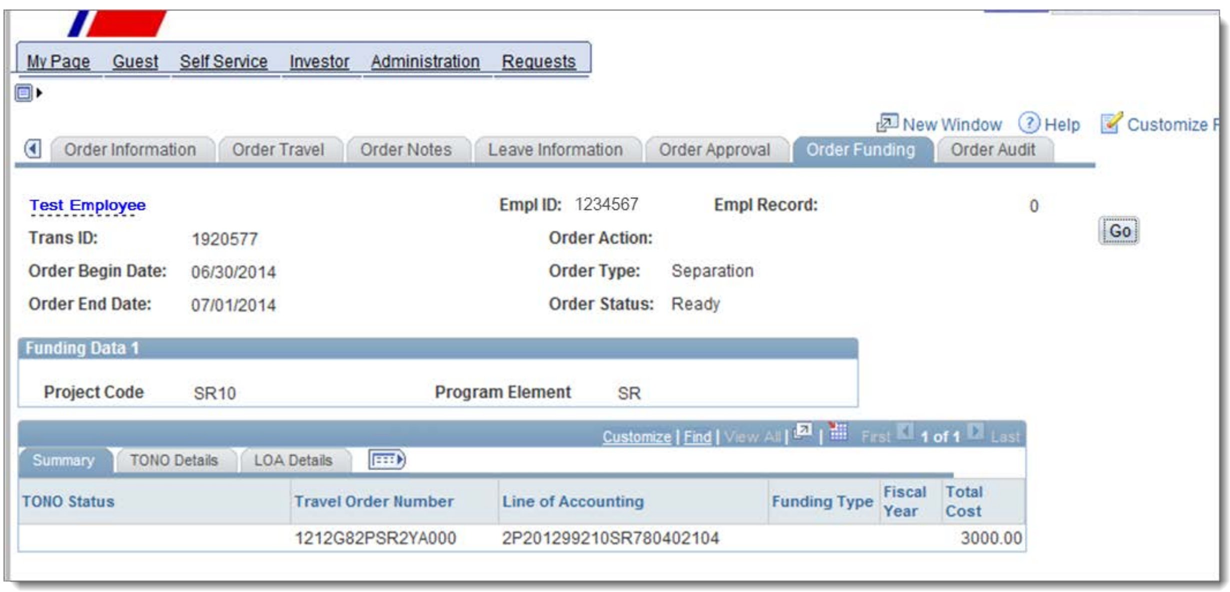


Figure 20: TONO and Accounting

The cost total for standard Order TONOs is pre-populated at $3000.00.
The user may not update this page.

4.8 Non-Standard TONO for a Death

When the Separation is a Death, the system will NOT automatically create a TONO on the Order. In this case, the user will enter a Non-Standard TONO on the Funding page.

The manual TONO entry process works as follows:

- A non-Standard TONO may be requested from the Funds Manager.

- The Funds Manager uses a separate component to generate the TONO and Line of Accounting, then communicates that information back to the SPO.
- The SPO or authorized user inserts a row on the Order Funding page and manually enters the non-standard TONO information.

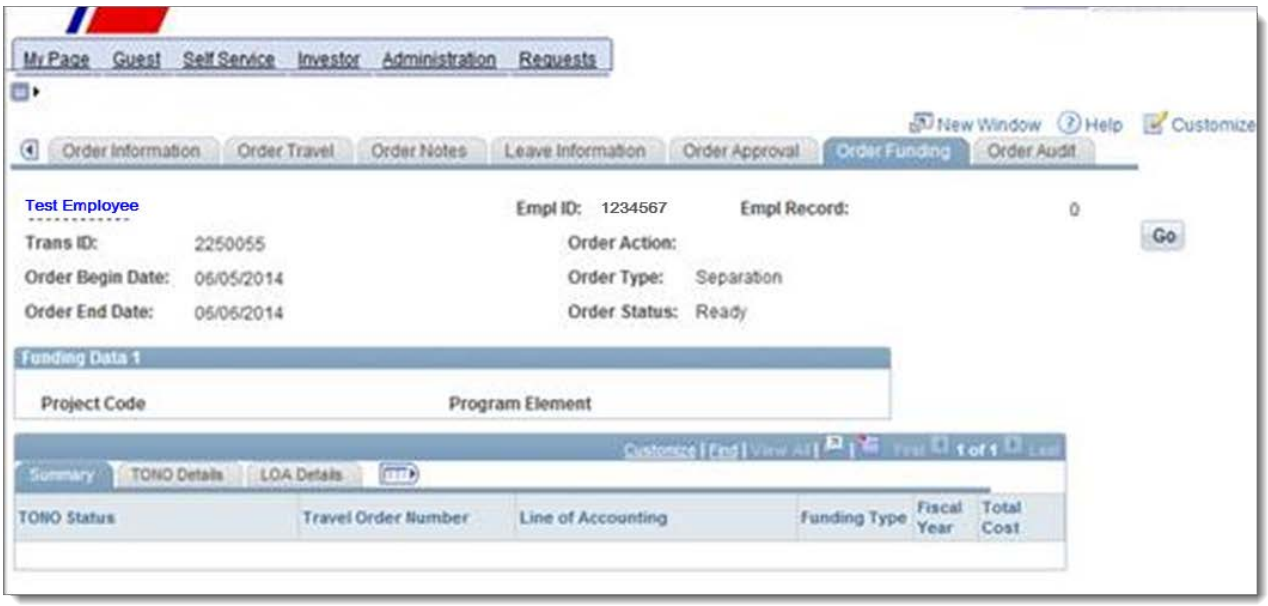


Figure 21: Non-Standard TONO, Manual Entry

Only authorized users may add a manual TONO row on the Funding page.
A (+) button displays.

- The user clicks the button to add a new row.
- The user enters the non-standard TONO and Line of Accounting on the new row.
- The Total Cost may be entered.
- Save this page before submitting the order for Approval.

4.9 Submit Order for Approval

1. Click the Order Approval tab.

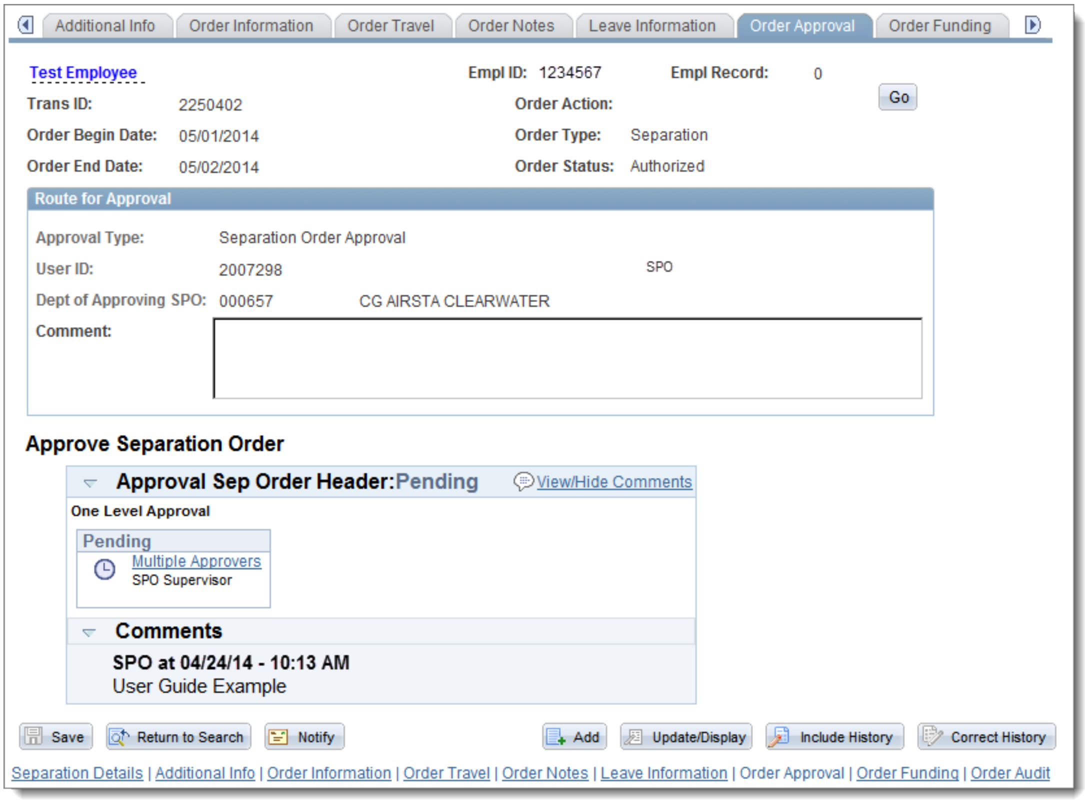


Figure 22: Order Approval

The SPO user will enter any Comments they wish the approver to see (or leave blank), then Submit the Order for approval. The Order is routed to the Department's SPO Supervisors, according to the SPO Tree.

2. Enter Comments, if needed. If you leave the field blank, the system will default it to <No Comments>

3. Click Submit.

4. The Approve Separation Order section below displays the SPO submitter information and Comments. Click on the Multiple Approvers hyperlink to displays a list of SPO Supervisors who can approve the Order.

4.10 Approve Order

A SPO Supervisor user in the Department's SPO 'Tree' must Approve the Separation Order. The Multiple Approvers link will display which users may approve this order.

Any SPO Sup in the SPO/Department tree may view and open the Approval Request. Only one user needs to Approve. Once approved, the order will no longer be available to other users for approval.

1. To view orders awaiting approvals, click Requests from the Direct Access Portal Home page.

Figure 23: My Requests

2. Click View My Requests (all types).

Figure 24: View My Requests (all types)

3. The View My Action Requests page displays. Select 'Requests I am Approver For.'

4. Select Transaction Name 'Approval Sep Order Header.' This will narrow the list to Separations approval requests. You may also filter by Status and Submission Dates.

5. Click Populate Grid to see a list of requests awaiting approval

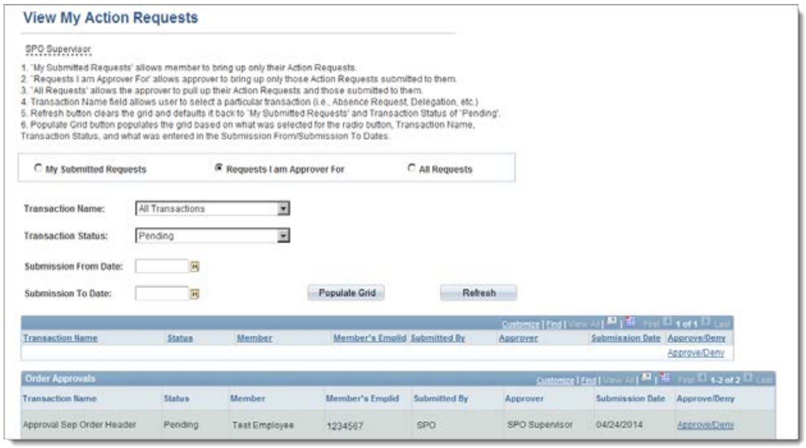


Figure 25: View My Action Requests-Results Grid

6. Click the Approve/Deny link on a row to open the Order to the Approval page.

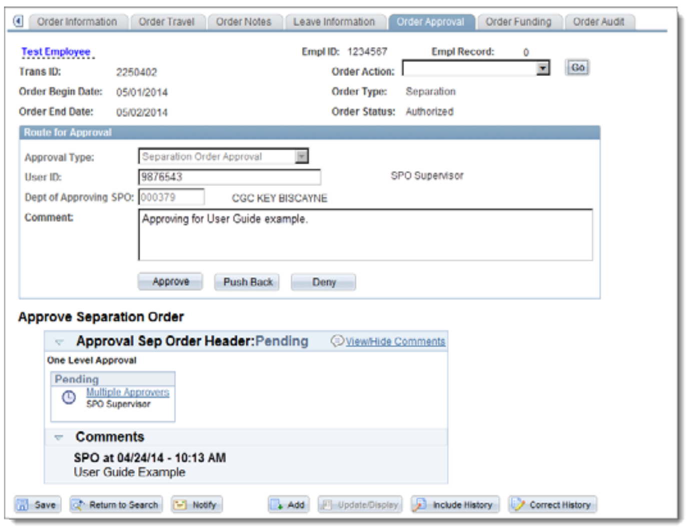


Figure 26: Approval Pending Separation Order

7. Enter Comments in the Route for Approval section.

8. The Approval Sep Order Header box tracks the SPO submitter information and any Comments from the SPO. It will refresh later, to track the SPO Sup's approval.

9. Click the Approve button below the Comments. This single approval will apply to all travel details and leave disposition for this order.

10. Once the Order is approved, the Order Status will update to 'Ready.' The Action Request (approval) Status also updates on the Requests page.

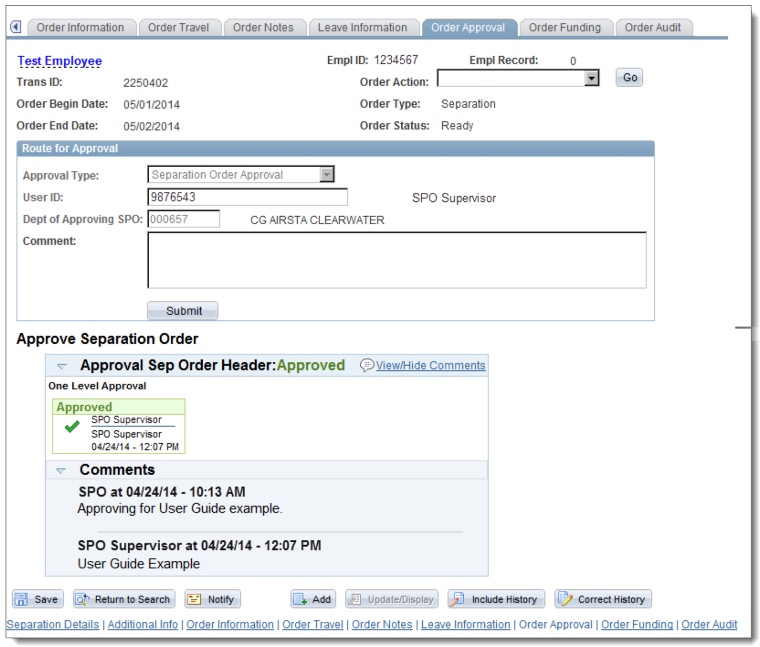
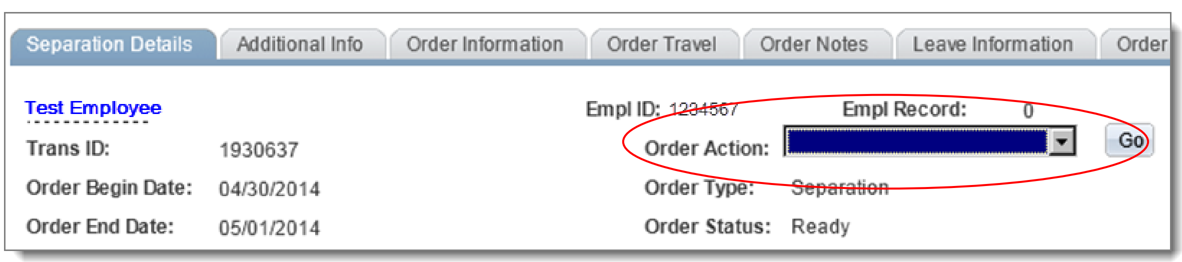


Figure 27: Approved Separation Order

11. Users may generate printed copies of the approved order, using the Order Action dropdown in the Order header.

4.11 Printing Orders

Users may generate printed copies of the order, using the Order Action dropdown in the Order header.



- The order may be in any status (Authorized, Ready) when it is printed.
- The printed order generates a pdf file in CG-5131 format.
- If the order has not yet been approved, some data will not display on the order; for example, Order Funding and Line of Accounting.
- The generated order will display the Order Status in the heading.

Authorized status does not signify an approved order! Ready status conveys the order has been approved.

4.12 Initiate Orders without a Separation Request

In many separation scenarios, a Separation Request/Authorization is not needed. The SPO may initiate a Separation Order directly from that component. The Order must still be approved by a SPO Supervisor.

4.13 Example: Routine Discharge – End of Enlistment

An Order is created to process a discharge. A Separation Request is not needed to process an End of Enlistment Discharge for a member. The steps below demonstrate an End of Enlistment Discharge for an Enlisted member.

1. From the Direct Access Portal Home page, click on the Separation Orders link in the Separations pagelet.

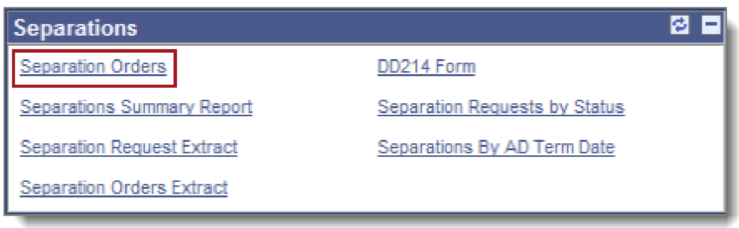


Figure 28: Separation Orders Link

2. Click Add a New Value to create a new Order.

3. Enter the EmplID of the member being discharged.

4. Click Add.

Figure 29: Discharge Separation Order

5. The Separation Details page displays. SPOs will enter most fields on this page for a new order.

6. Select Discharge as the Termination Type Code.

7. Enter the Termination Date using the calendar tool.

8. Select KBK or other appropriate code as the SPD Type.

9. Select RE1 or other appropriate code as the Re-Enlistment Code.

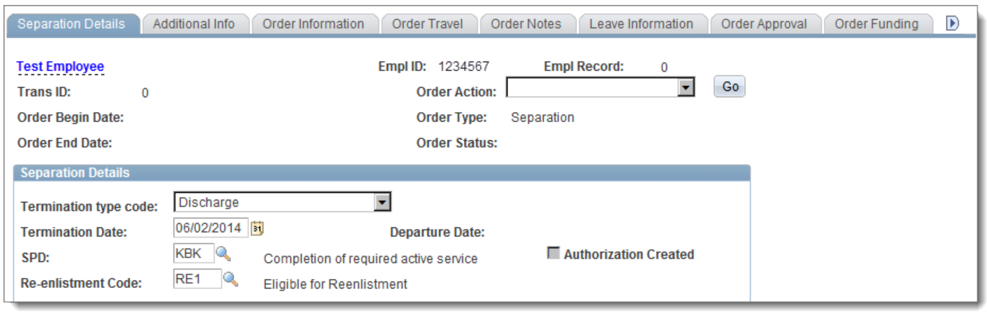


Figure 30: Separation Details

10. In the Discharge Enlisted section, for Character of Service select Honorable.

11. Select Expiration of Enlistment for Type.

12. For Status select Rcmd Reenlist but does not desire.

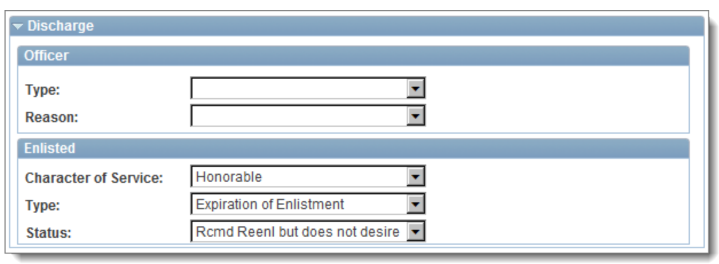


Figure 31: Discharge Section

13. Click on the Order Information tab.

14. Enter the name of the Authorizing Official; this is the SPO Supervisor's name.

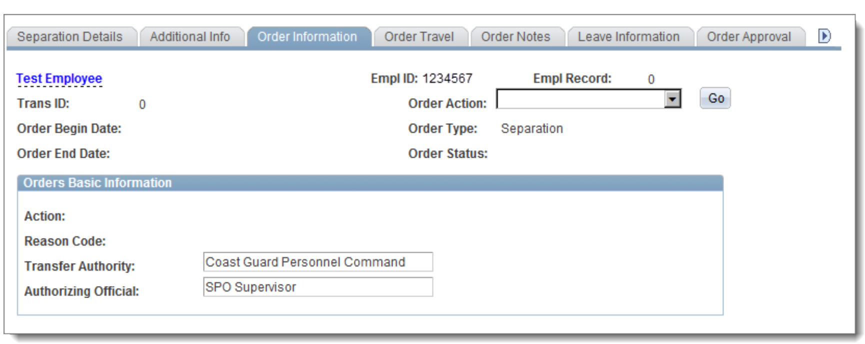


Figure 32: Order Information Tab

15. Click the Order Information tab.

16. Click View All to see the Depart and Report rows together on the page.

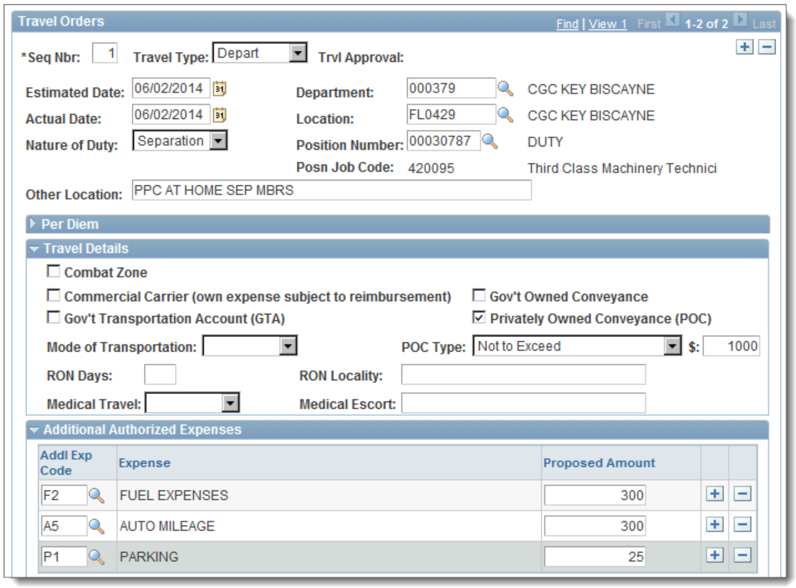


Figure 33: Depart Row/Seq Nbr 1

17. In the Depart row, enter the Estimated Date of the Discharge. This is usually the last day of duty.

18. Enter the Actual Date. This should match the Discharge Date.

19. Select Separation as the Nature of Duty.

20. Verify the Department, Location, Position Number and Posn Job Code that the member is leaving; these are derived from the member's Job record.

21. The Other Location field is editable.

22. In the Travel Details section, select any items the member is authorized to incur while separating.

23. In the Additional Authorized Expenses section, use the + button to add an expense code and details. Multiple rows of expenses may be added.

24. Scroll down to the Report row.

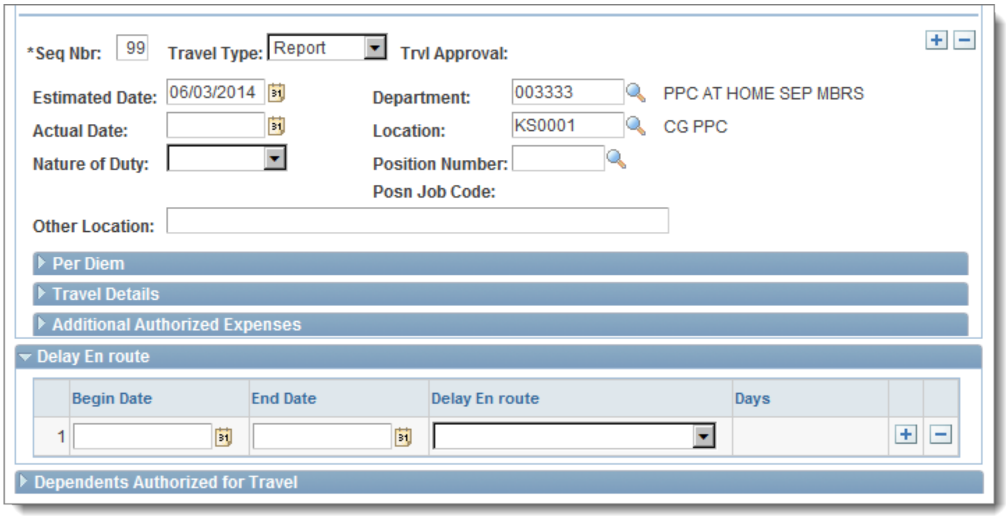


Figure 34: Report Row/Seq Nbr 99

25. In the Report row enter the Estimated Date and Actual Date of Discharge.

26. Select Separation for the Nature of Duty from the drop down list.

27. Verify the Department the member will report to upon Separation (or 003333 for 'Home.'

28. Verify the Location of the Department

29. Verify that there is no Position Number.

30. Verify that there is no Posn Job Code.

31. Click Save.

32. In the Delay En Route section, enter any Terminal Leave the member plans to use.

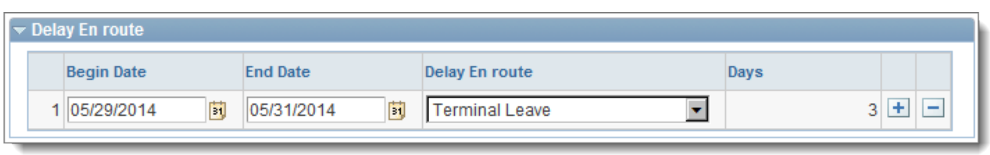


Figure 35: Delay En Route - Terminal Leave

33. Use the calendar tool to select a Begin Date.

34. Use the calendar tool to select an End Date. This must be the same date as the Discharge Date.

35. Select Terminal Leave from the Delay En Route drop down.

36. Click the Order Notes tab.

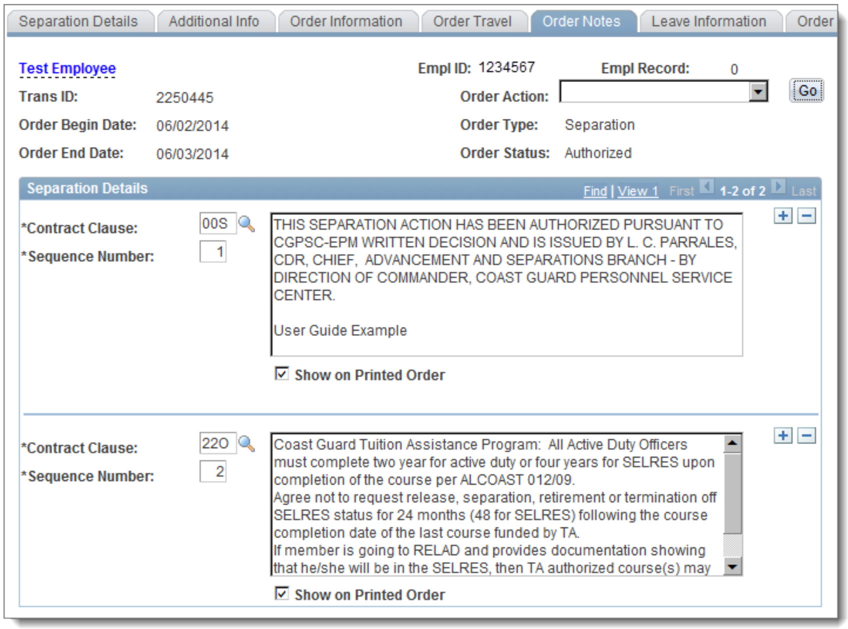


Figure 36: Order Notes

37. Insert a Contract Clause by clicking on lookup tool and making a selection.

38. Enter a Sequence Number.

39. Edit the text of the Clause or insert additional text.

40. Click  to insert a second clause.

41. Select a Contract Clause using the lookup tool.

42. Enter the Sequence Number.

43. Edit the text of the Clause or insert additional text.

44. Click Save.

45. Click on the Leave Information tab.

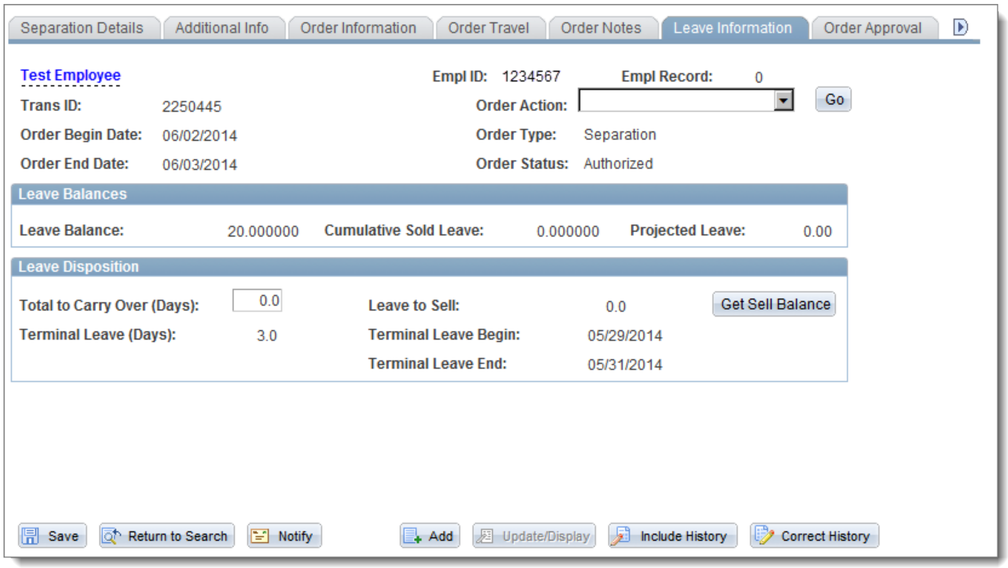


Figure 37: Leave Tab

46. The Terminal Leave (Days) reflects the same days that were entered in the Delay En Route section on the Travel page.

47. Leave Balance: Balance as of current pay/absence calendar. Does not factor in future leave requests that have been approved beyond current month.

48. Total Carry over: Specified by the SPO if member requests. This will be subtracted from the leave available to sell. Total to Carry Over (Days) is defaulted to 0.

49. Terminal Leave: Sum of terminal leave days specified.

50. Leave to sell: Derived from projected leave and reduced by cumulative leave already sold and leave carried over.

51. Cumulative leave sold: Leave balance previously sold.

52. Projected Leave: Leave balance as of separation date, factoring in all approved leave.

53. Click on the Order Approval tab.

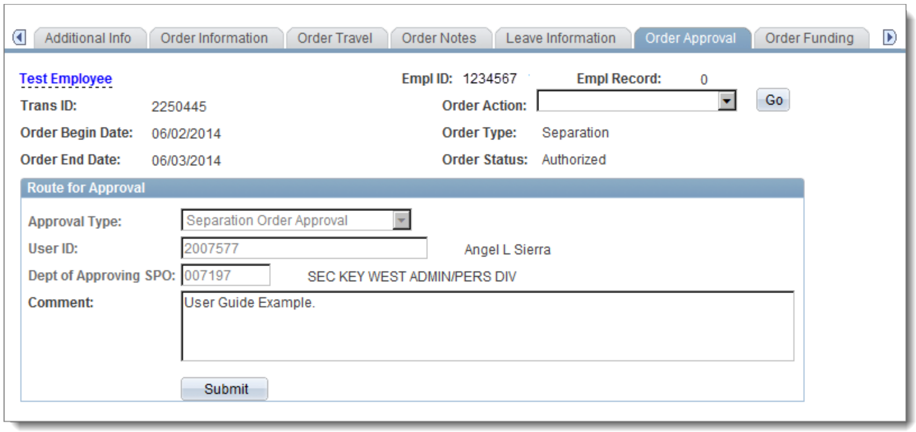


Figure 38: Order Approval

54. The Approval Type is defaulted.

55. The User ID is defaulted to the SPO EmplID.

56. The Dept of Approving SPO is defaulted.

57. Enter Comments that you wish the SPO Supervisor to see.

58. Click Submit.

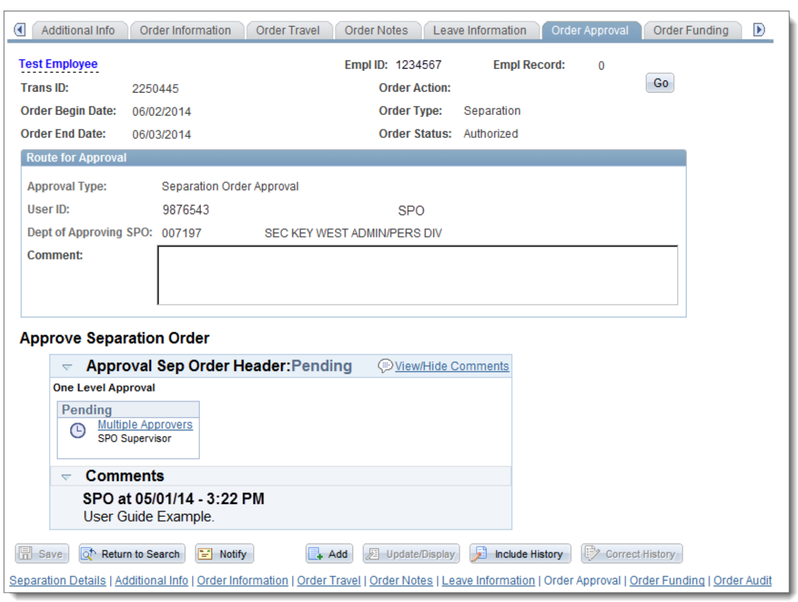


Figure 39: Order Approval Submitted

5.0 Order Approval

1. To view orders which require SPO Supervisor approval, log in as a SPO Supervisor user.

2. Click Requests from the Direct Access Portal Home page.

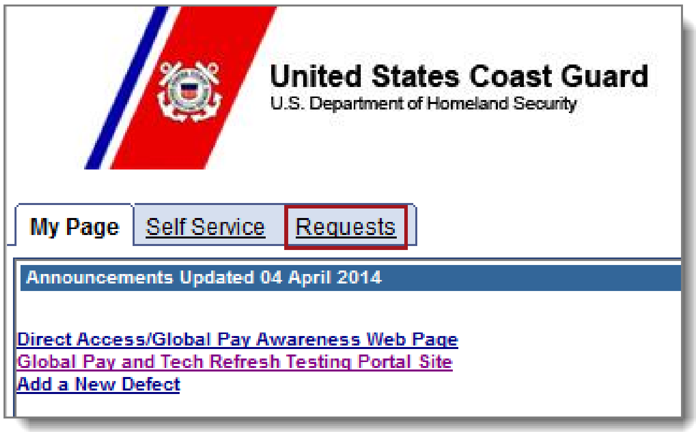


Figure 40: My Request

3. Click View My Requests (all types).

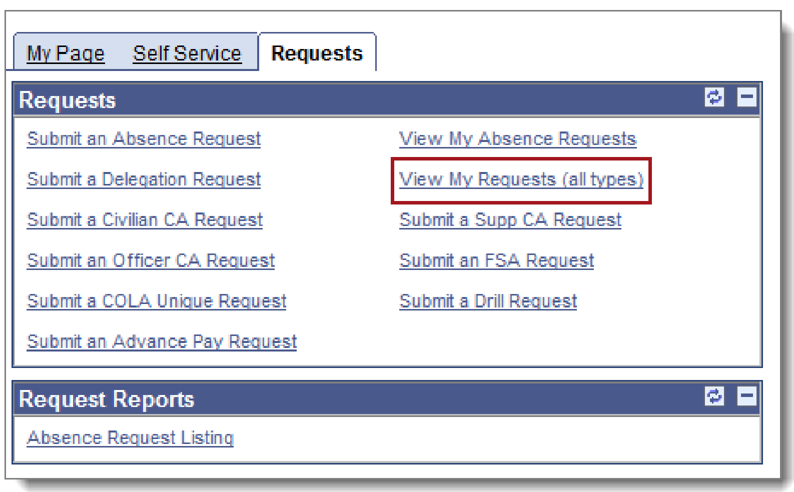


Figure 41: View My Requests (all types)

4. Select Requests I am Approver For.

5. Click Populate Grid. The Order Approvals grid displays all requests according to the filters you set.

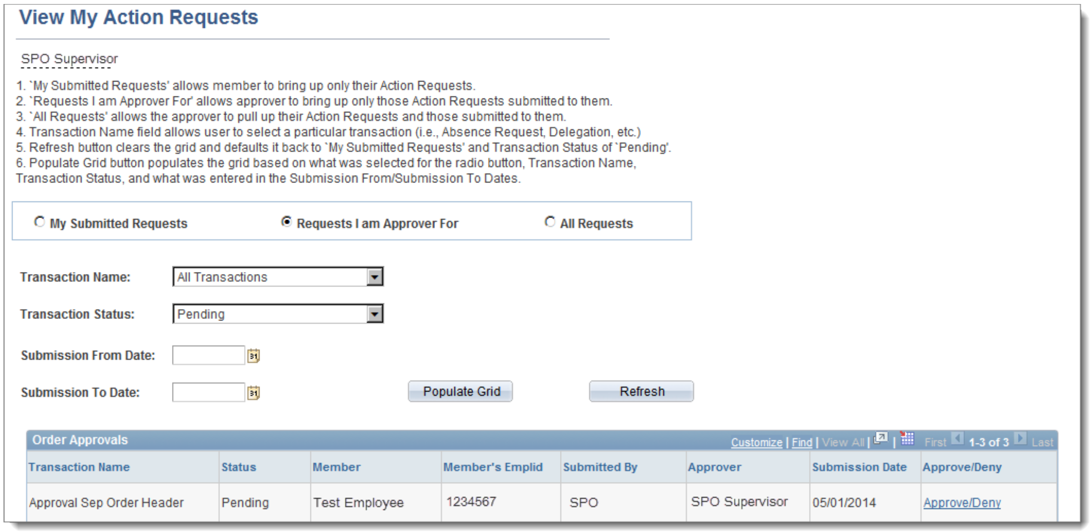


Figure 42: View My Action Requests

6. Click Approve/Deny. The Order will open to the Approval page.

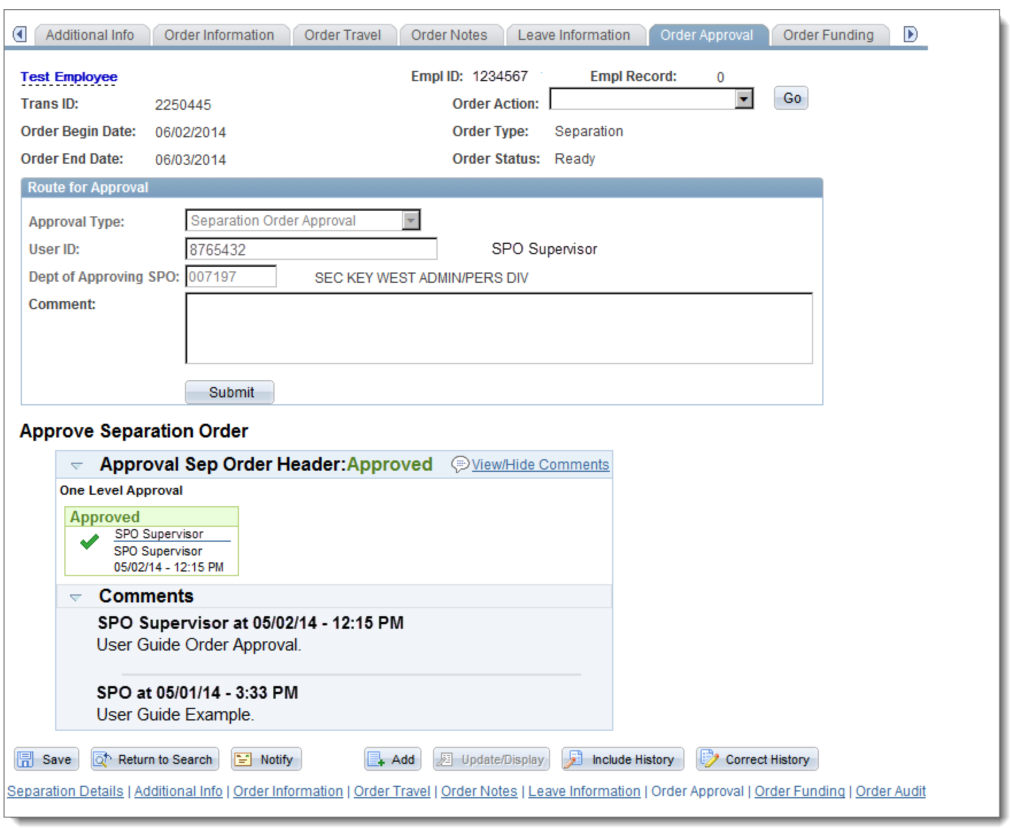


Figure 43: Approving Order

7. The Approval Sep Order Header box tracks SPO submittal and Comments. The Multiple Approvers link shows all SPO Supervisors who may approve this Order. It will refresh once the SPO Supervisor has approved, to show those details.

8. Enter Comments in the Route for Approval section. The Order cannot be approved without comments.

9. The Approval Sep Order Header box tracks the SPO submitter information and any Comments from the SPO. It will refresh later, to track the SPO Sup's approval.

10. Click the Approve button below the Comments. This single approval will apply to all travel details and leave disposition for this order.

11. Once the Order is approved, the Order Status will update to 'Ready.' The Action Request (approval) Status also updates on the Requests page.

12. Users may generate printed copies of the approved order, using the Order Action dropdown in the Order header.

6.0 Death Separation Orders

PPC, or any SPO, may enter a Separation Order for a death. A Separation Request is not required. A different user, typically a SPO Supervisor, must approve the Order. A Death Order follows the same basic procedure as for other types of Separation Orders, in Direct Access 9.1.

6.1 New Business Process for Death Orders

The following is a process change from the Direct Access 8 procedure for Deaths.

- All relevant information may be entered on the Separation Order component. The Death of Member component will no longer be used.
- Users will be able to select whether the death is in the Line of Duty, or the member is otherwise eligible to receive retirement pay. Making this selection will create an additional, retirement (RWP action) row in the member's Job record, preceding the Termination (Death) row.
- The user may also indicate whether the member qualified for Heroism or Good Conduct.
- The final Travel details (Depart, Report, Dependents, etc.) shall be entered on the Separation Order, Order Travel tab. An additional PCS order is not needed.
- A basic TONO with line of accounting and an estimate will be created upon the SPO Supervisor role's approval. The TONO may be updated later, from a different component, to accommodate 'Blue Bark' TONO specifications.

6.2 Details of Death Order

On the Separation Details page:

1. Select Termination Type: 'Death'
2. Enter Termination Date: usually the date of death
3. Select SPD Code: D26 is currently used

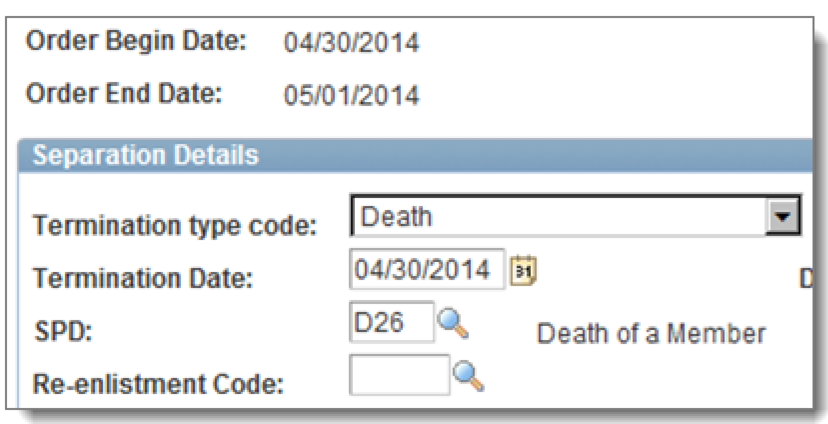


Figure 44: Details of Death Order

Click the blue 'Death' section bar to open that section of the page:

1. Enter Date of Death
2. Select In Line of Duty, or other value, if applicable.
3. Select a value for Heroism/Good Conduct, if applicable.

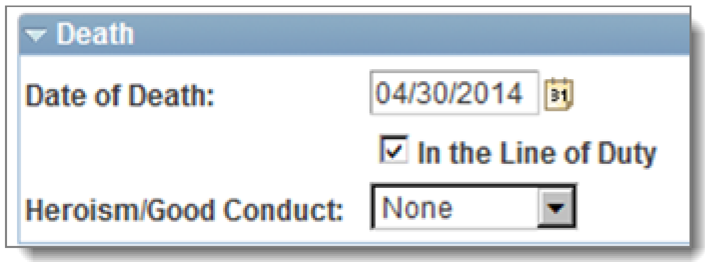


Figure 45: Death Section

6.3 Inserting A Non-Standard (Manual) TONO

When the Separation is a Death, the system will NOT automatically create a TONO on the Order. In this case, the user will enter a Non-Standard TONO on the Funding page.

The manual TONO entry process works as follows:

- A non-Standard TONO shall be requested from the Funds Manager.
- The Funds Manager uses a separate component in Direct Access to generate the TONO and Line of Accounting, then communicates that information back to the SPO.
- The SPO or authorized user inserts a row on the Order Funding page and manually enters the non-standard TONO information.

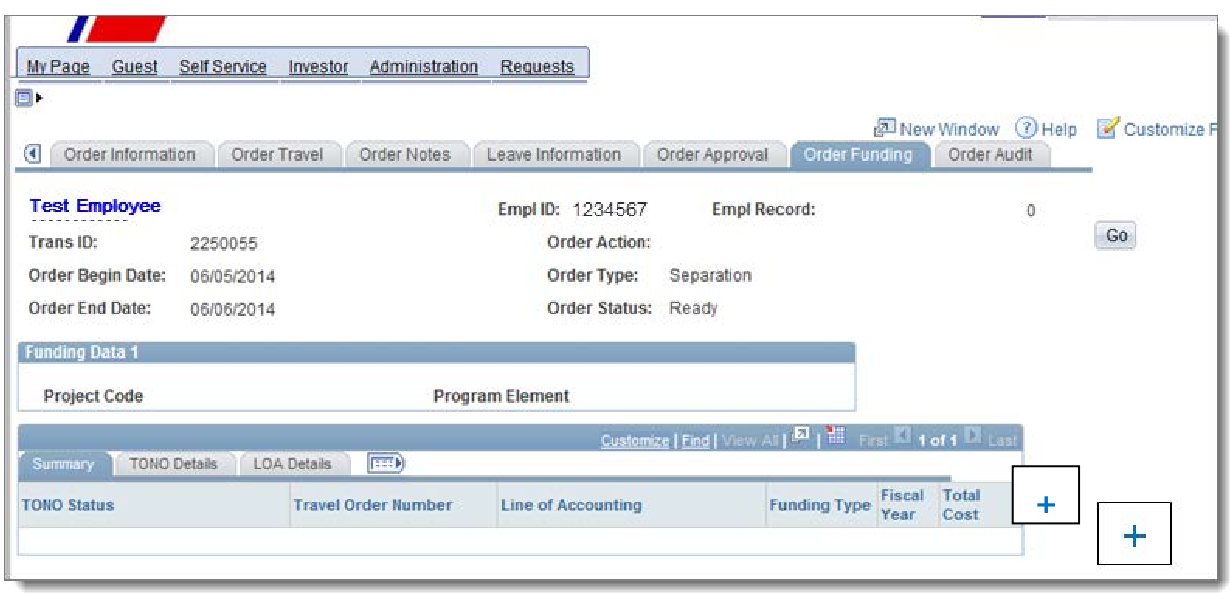


Figure 46: Non-Standard TONO, Manual Entry

Only authorized users may add a manual TONO row on the Funding page.
A (+) button displays.
The user clicks the(+) button to add a new row.
The user enters the non-standard TONO and Line of Accounting data on the new row.
The Total Cost may be entered.
The user must save this page before submitting the order for Approval.

6.4 JOB Actions

After the Death Separation order has been processed, a Termination/Death JOB row is created. A retirement row (RWP) may also be created, if the member is eligible.

Figure 47: Retirement Row (if eligible) Precedes Death Row

Figure 48: Termination/Death JOB Row is Current

- Member remains in the USCG AD pay group, but in Inactive pay status
- Global Payroll will process final pay for these members, and cease regular pay.
- Deceased members will remain in a valid pay group for any future final pay processing.

6.5 Amending a Death Order

If the order must be updated after approval and/or order processing, the SPO may open the order and use the Order Action field, 'Amend Order' action. Please refer to the "Amending an Order" process in Section 9 of this manual for further detail.

- The amended order must be re-submitted for SPO Supervisor approval.
- If the initial Order was already Finished (processed to JOB), an Amend/Cancel Action may require updates to the JOB row and manual Payroll updates.
- SES should be notified of potential Payroll changes.

7.0 RELAD – Release from Active Duty

Most RELADs may be created from the Separation Order component.
On the Separation Details page, complete the RELAD section fields.

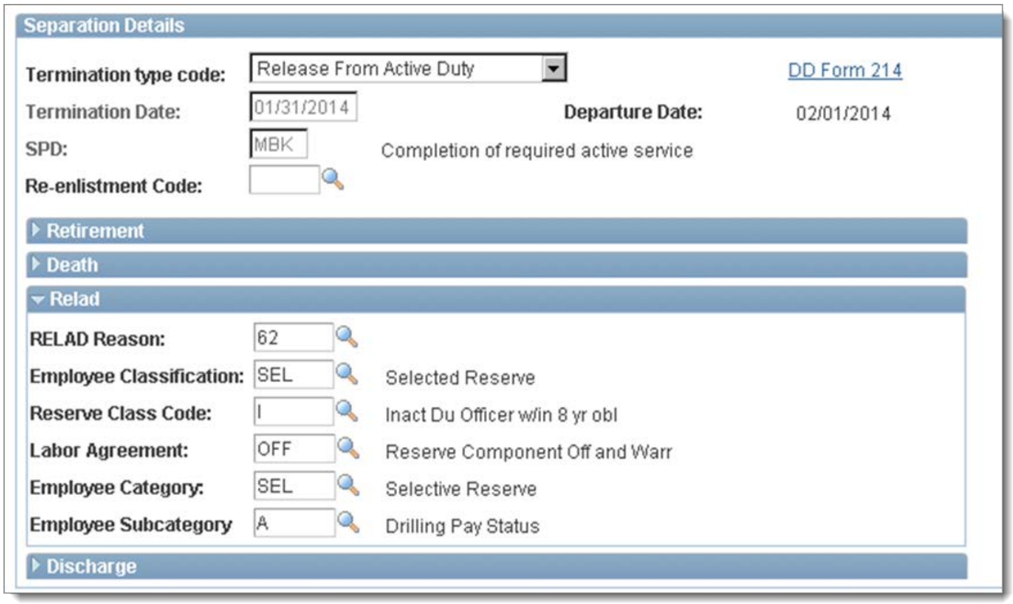


Figure 49: RELAD Section

The Relad section values populate from the member's current JOB record.

Be sure to update the RELAD section to new values reflecting the member's future status once released. All values are carried over to the new JOB record that will be created by the RELAD action. For example, If the member is released and moving to RET-2, you must change the Employee Classification to RET-2.

RELADs and Department / Position Changes

For members releasing to IRR or SELRES, Department and Position numbers must be entered on the Reporting row (Seq 99) on the Travel page, before submitting for approval. <u>These values do not default</u>.

- For RELADS to SELRES, the SPO should enter a valid Dept/Posn combination obtained from RPM/CGRC.
- For RELADs to IRR, the SPO should enter Dept ID#002817 and Posn #00062025.
- The Location will default from the Department.
- The member's current Business Unit shall be retained on the new JOB record.

8.0 Amending an Order

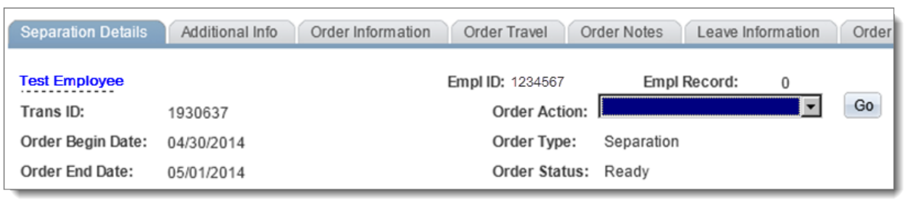
Separation Orders that have already been approved by a SPO Supervisor and are in ‘Ready’ or ‘Finished’ status may be amended. <u>Any amendments to Separation Orders must be re-submitted for approval.</u>

If the Order has already been processed to JOB (within 4 days of Termination Date), the order may still be amended from Separations, but SES must be notified for updates that may be needed to the Job and Payroll records.

1. Search for the Order by EmplID, or other criteria.

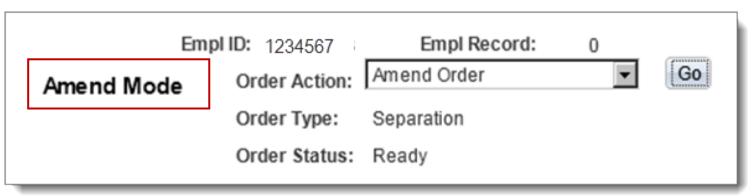
2. On the Separation Details tab, select Amend Order on the Order Action drop-down.

3. Click the Go button.



<u>Figure 50: Separation Details Tab</u>

The Order now displays ‘Amend Mode’ on the page.



<u>Figure 51: Amend Mode</u>

Perform any updates necessary to the Order. When the changes are complete, click on the Order Approval tab.

In the Route for Approval box, the Approval Type will reflect Amend Order.
The user must enter a Comment on the nature of the changes made.

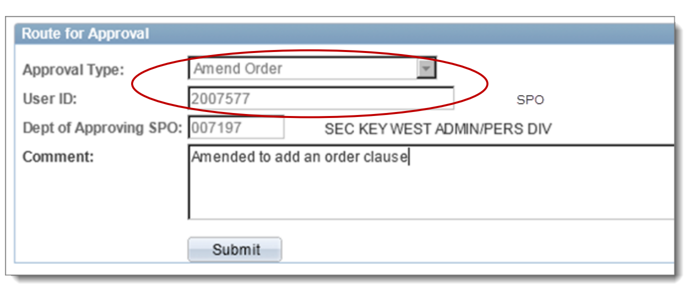


Figure 52: Route for Approval Box

4. Click Submit to route the amended Order to the SPO Supervisor for re-approval.

5. The SPO Supervisor uses My Requests / View My Requests search page to open the order awaiting approval.

Select the Transaction Name criteria 'Sep Order Amend' and Status 'All Statuses' to find the amended order.

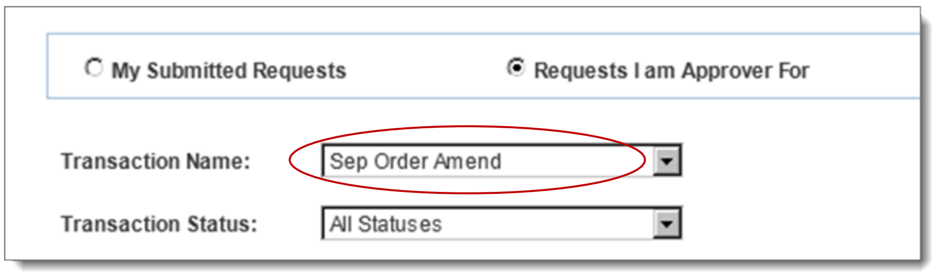


Figure 53: My Request/View My Request Search Page

6. Click on the View/Approve link in the results row to open the Order.

7. The SPO Supervisor must enter a Comment before clicking Approve.

Figure 54: Route Amendment for Approval

8. After the order page is refreshed, the Approval section will reflect the Amendment approval.

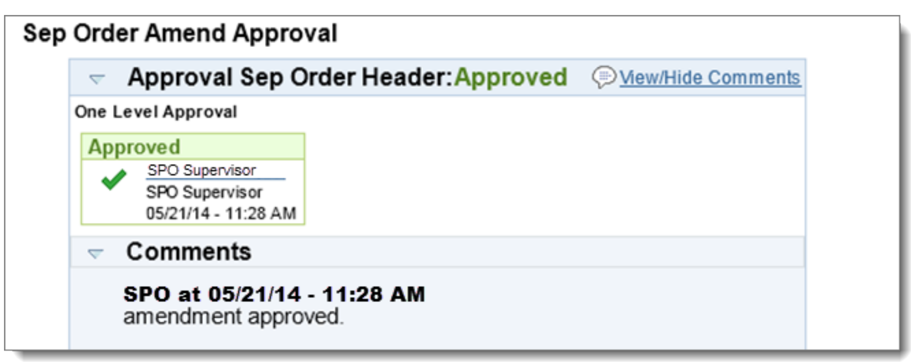


Figure 55: Amendment Approval

9.0 Cancelling an Order

Cancelling an Order should be performed if the Separation will no longer take place.
The user must not delete the Separation Order; instead, the Cancel action will inactivate the Separation order, keeping the record in the system for reference.

When a situation requires a Separation Order to be completely cancelled, the process depends on how the order was initiated, and the current status of the Order.

- Orders created from the Separation Request page must be cancelled from the Request.
- Orders created from the Separation Order page must be cancelled from the Order.

9.1 Initiating Order Cancellations: When and How

Following are sample Cancellation scenarios, according to the Order origin and Status:

Scenario 1: Separation Request created; Separation Order created – in **Authorized** status.
PSC cancels Separation Request.
Sep Order is automatically cancelled.

Scenario 2: Separation Request created; Order created –in **Ready** status.
PSC cancels Separation Request, contacts SPO to Cancel Order.
SPO initiates Cancel Order process, submits for Approval.
SPO Sup must approve cancelled Order.

Scenario 3: Separation Request created; Order Approved & processed to JOB –in **Finished** status:
Cancelling the Order will also remove the JOB row for the Separation.
SES must manually clean up any Leave or Global Payroll information.

Scenario 4: No Separation Request; SPO has created Order in Authorized status:
SPO may Cancel Order; no approval required (since it was not previously approved).

Scenario 5: No Separation Request; SPO has created Order, in Ready or Finished status:
SPO Cancels Order
SPO submits Order for Approval
SPO Sup must Approve cancellation
If order is already Finished and JOB row exists, cancellation will remove JOB row.
SES must manually clean up any Leave or Global Payroll information.

9.2 Cancel a Separation Request

Perform this step if the Separation Order to be cancelled initiated from a Separation Request.

1. Open the Separation Request page.

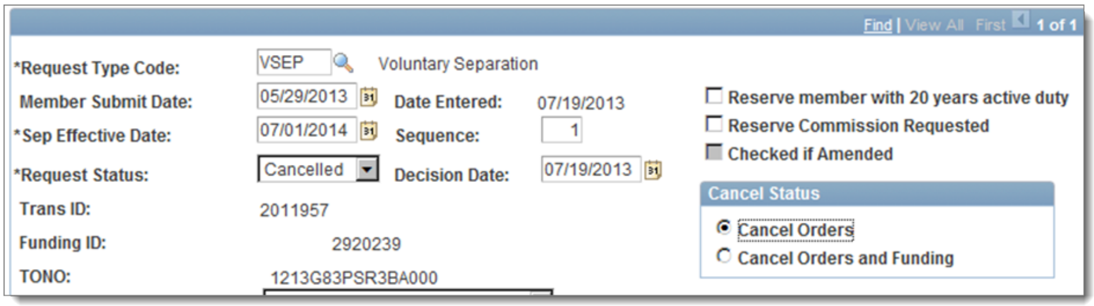


Figure 56: Cancel a Separation Request

2. Update the Request Status to 'Cancelled.'

3. In the Cancel Status box, select:
    - Cancel Orders (leaving the TONO as is),
    - Or, Cancel both the Order and the TONO.

4. Continue with the Cancel Separation Order to complete the process.

9.3 Cancel a Separation Order

Perform this step if the Separation Order to be cancelled initiated from a Separation Order.

1. Open the Separation Order page.
2. On the Separation Details page, the Order Action drop-down has a Cancel Order option.
    - Select Cancel Order.
    - Click the Go button.

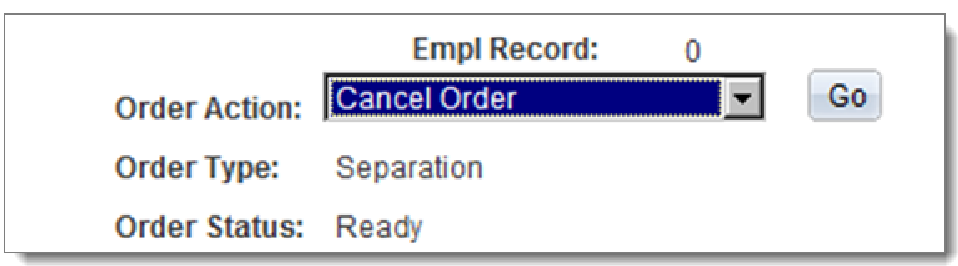


Figure 57: Cancel Order

9.4 Approving the Cancelled Order

In Scenarios 2-5 above, the SPO Supervisor must always Approve a cancelled order. If the Order Status was 'Authorized', then no approval is required for the cancellation.

On the Order Approval page, once the Order Action of 'Cancel' has been initiated, both the SPO and SPO Supervisor will see that the Approval Type is 'Cancel Order.'

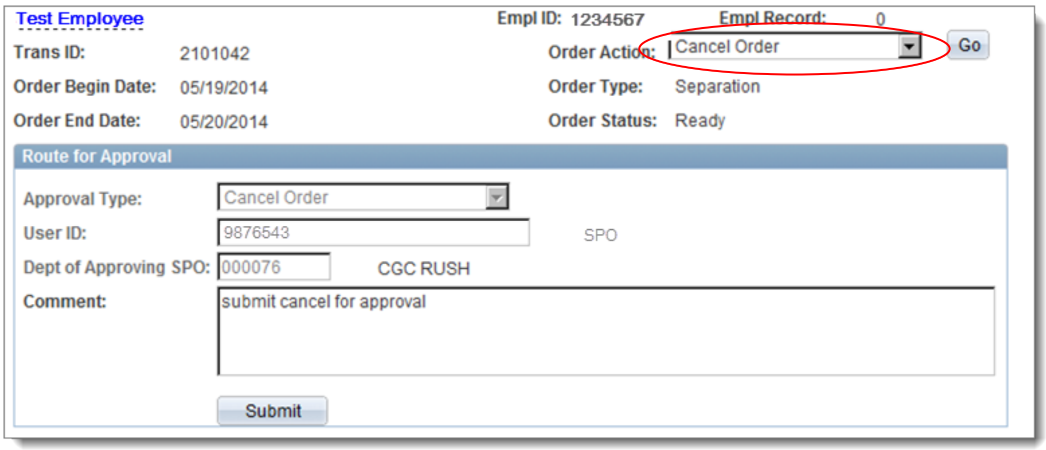


Figure 58: Order Approval Page

SPO steps:
Selecting the Cancel Order action and clicking Go immediately begins the Approval routing. SPO must enter Comments, then click Submit.

SPO Supervisor steps:
The acting SPO Supervisor must open the routed Action Request from the My Requests page, then click Approve.

9.5 Results of Cancelling an Order

Once the cancellation has been approved by a SPO Supervisor, the Order Status will update to 'Cancelled.'

If the initial Separation order was already Finished (processed) and a separation JOB row existed, the cancellation will delete that separation JOB row.

The SES Branch must be notified to manually update any remaining Leave or Global Payroll information.

10.0 Review Order

The Separation Details page allows the SPO user to enter in the basic separation detail and specify the effective date of the separation. Depending on the Termination Type Code, the user would enter further data into one of the group boxes for either Retirement, Relad, Discharge, or Death.

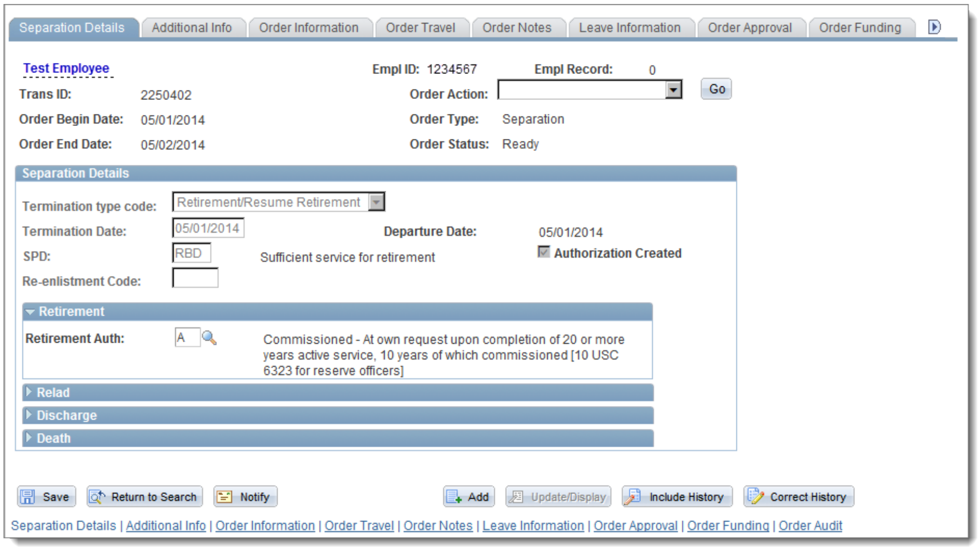


Figure 59: Separation Details Tab

The Additional Info page displays separation payroll related information to the SPO user. The information in the Separations Details block is coming directly from the information on the SEPARATION RQST/Authorization - Separation Info TAB.

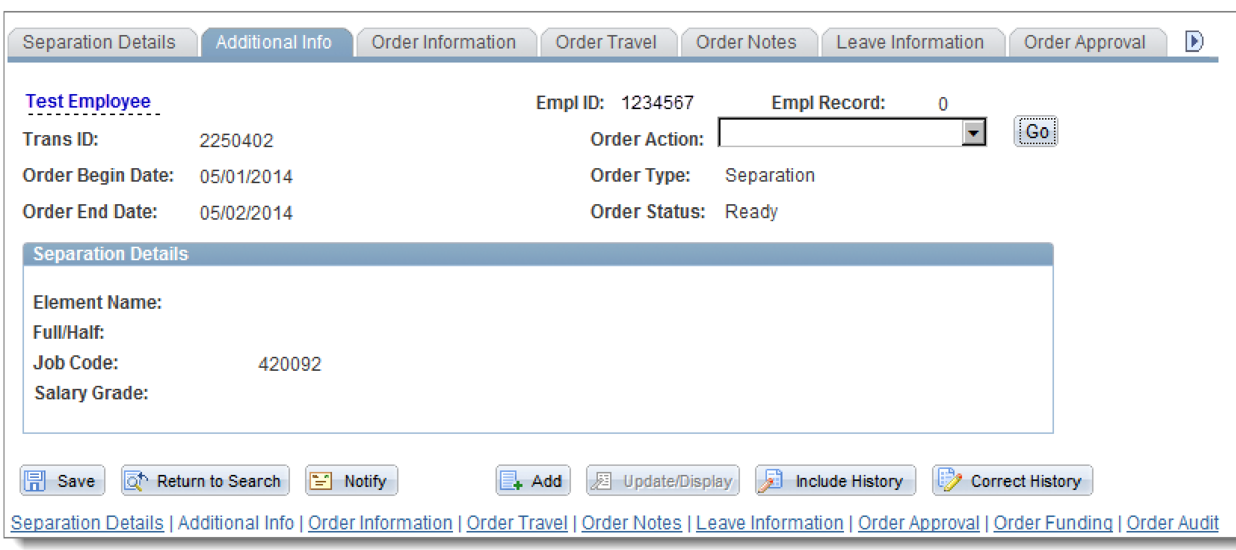


Figure 60: Additional Details Tab

Any information on this tab was input by PSC on the Authorization, and cannot be edited.

The Order Information page displays the separation Action/Reason and allows the SPO user to enter the Transfer Authority and Authorizing Official for the separation.

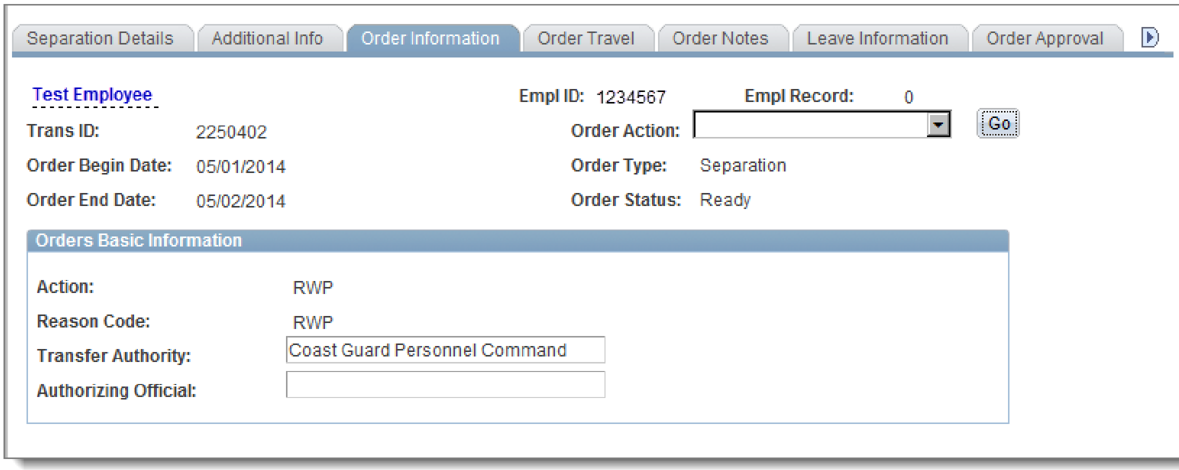


Figure 61: Order Information Tab

The Order Travel page displays the travel related information for a member if applicable, including the Itinerary, job related and cost information.

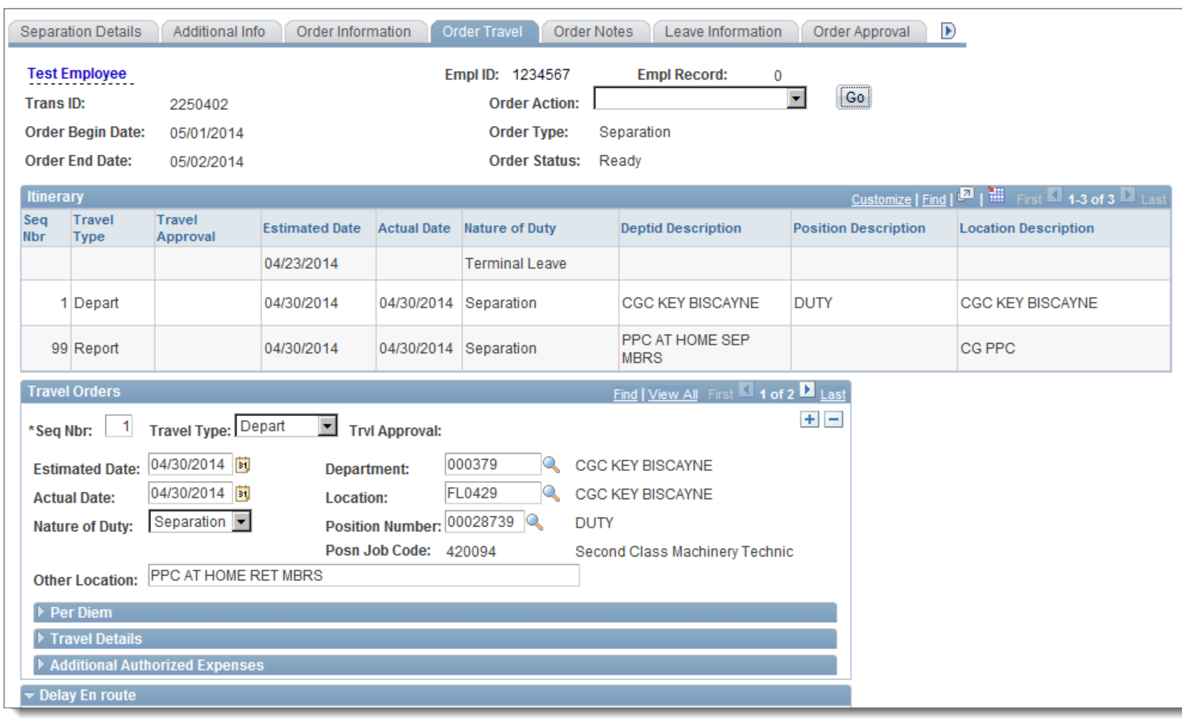


Figure 62: Order Travel Tab

The Order Notes page allows for the entry of Contract Clauses and additional manually entered notes in the open text box.

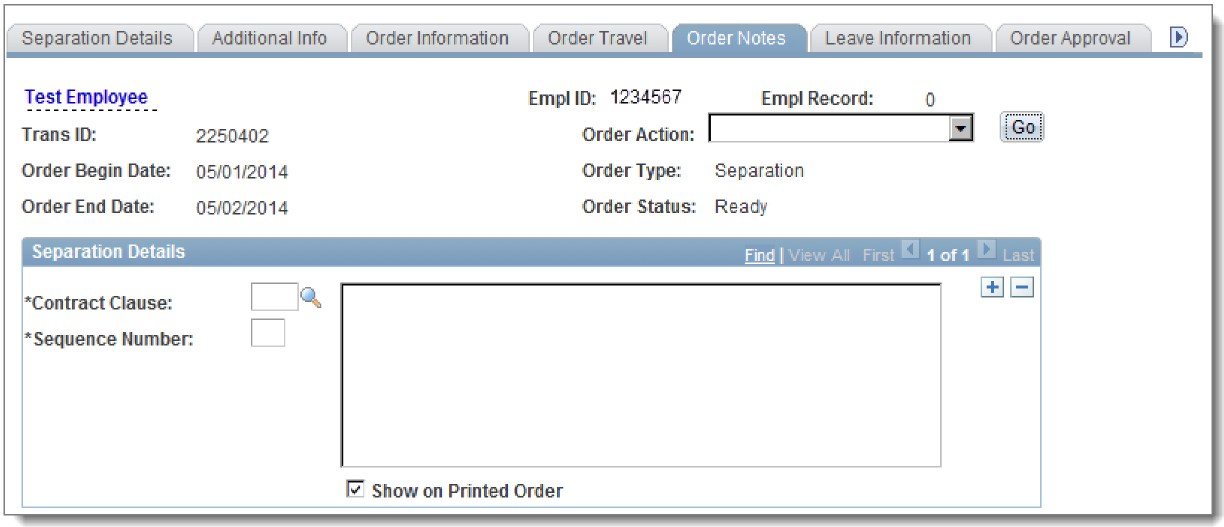


Figure 63: Order Notes Tab

The Leave Information page allows for the entry and display of Leave fields for the member's disposition of leave upon separation.

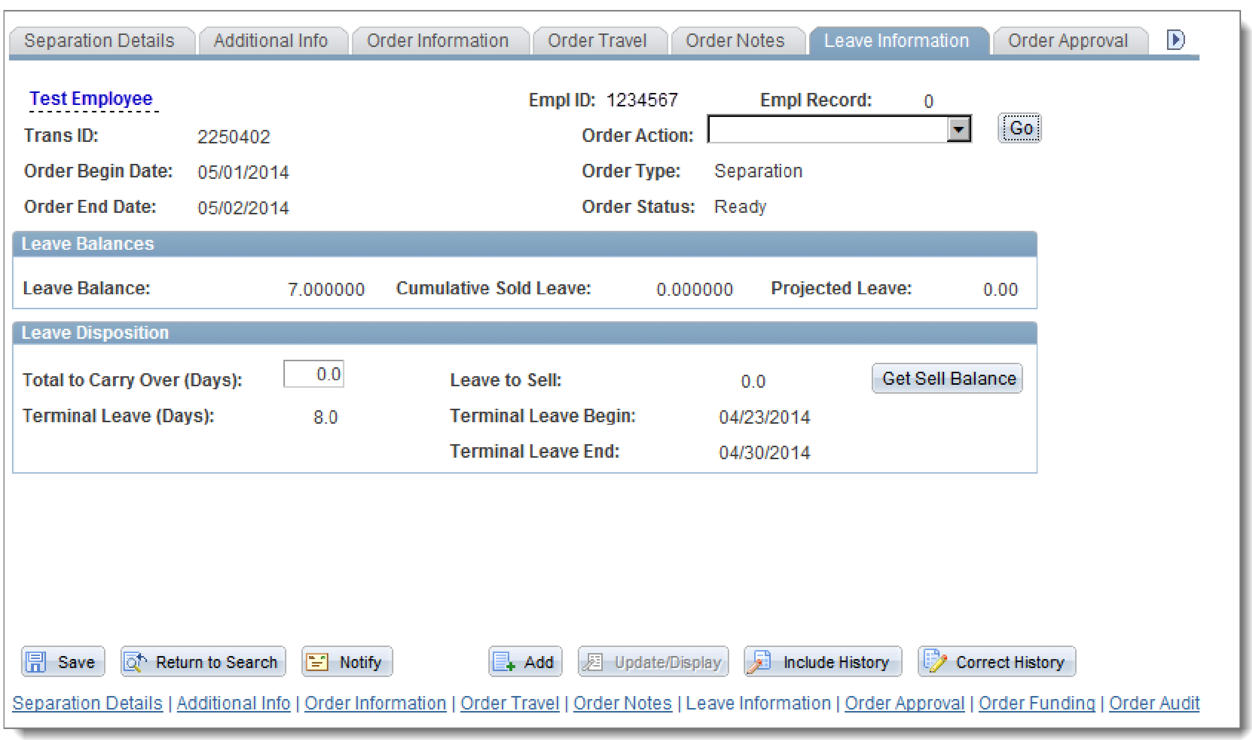


Figure 64: Leave Information Tab

The Leave Information page allows for the entry and display of Leave fields for the member's disposition of leave upon separation.

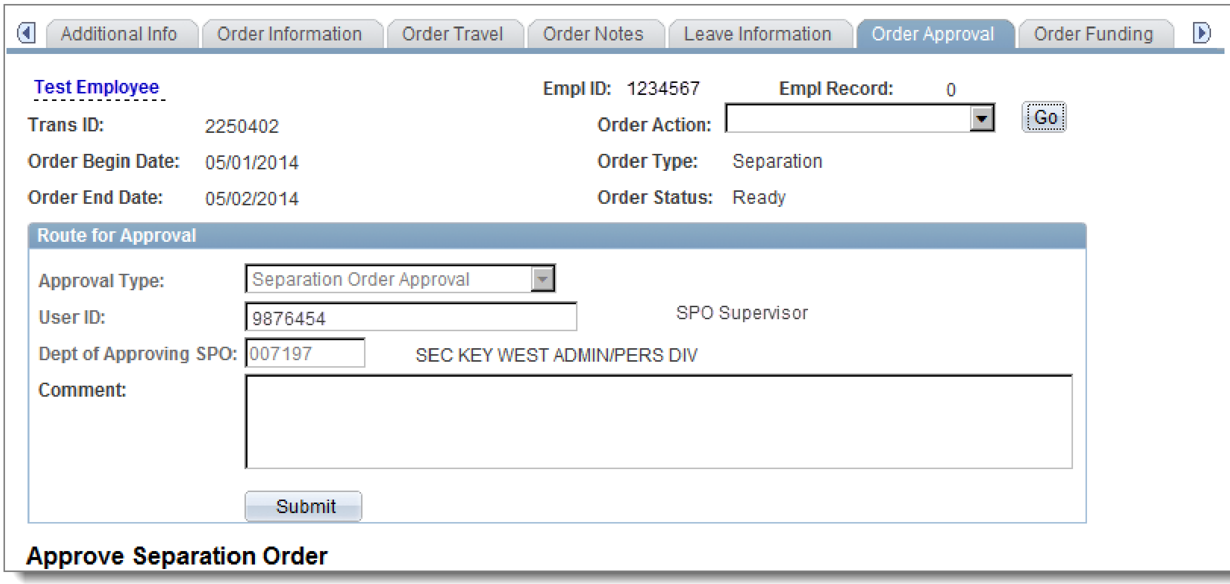


Figure 65: Order Approval Tab

The Order Funding page displays funding related data for the separation order. TONO Details and Line of Accounting data will not display until the order is Approved.

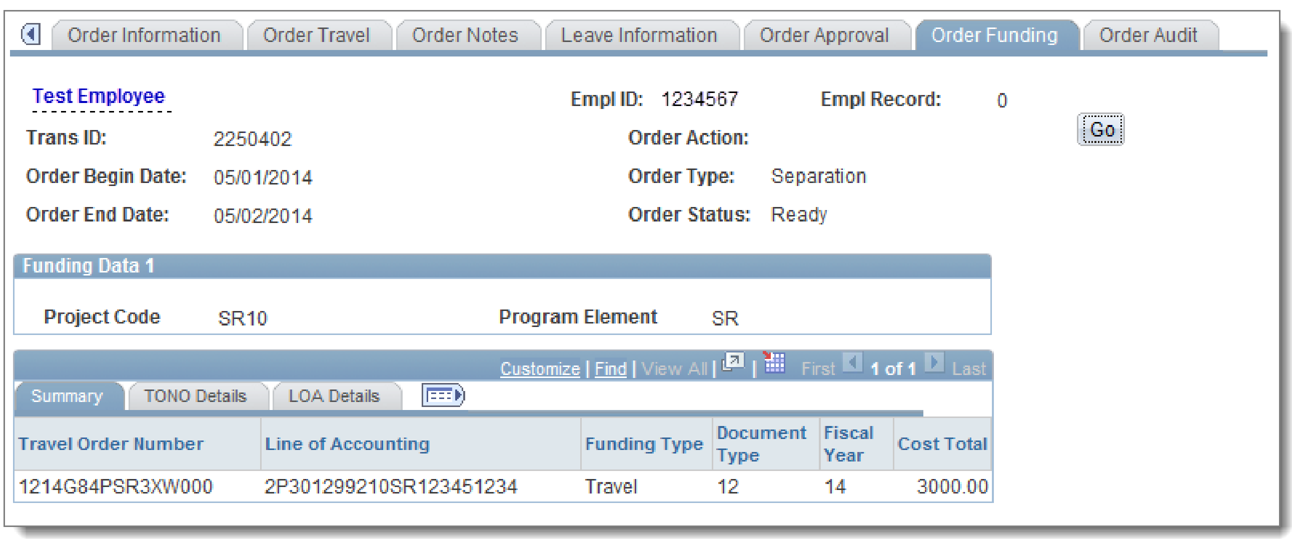


Figure 66: Order Funding Tab

The Order Audit page tracks all changes and approvals made to the separation order.

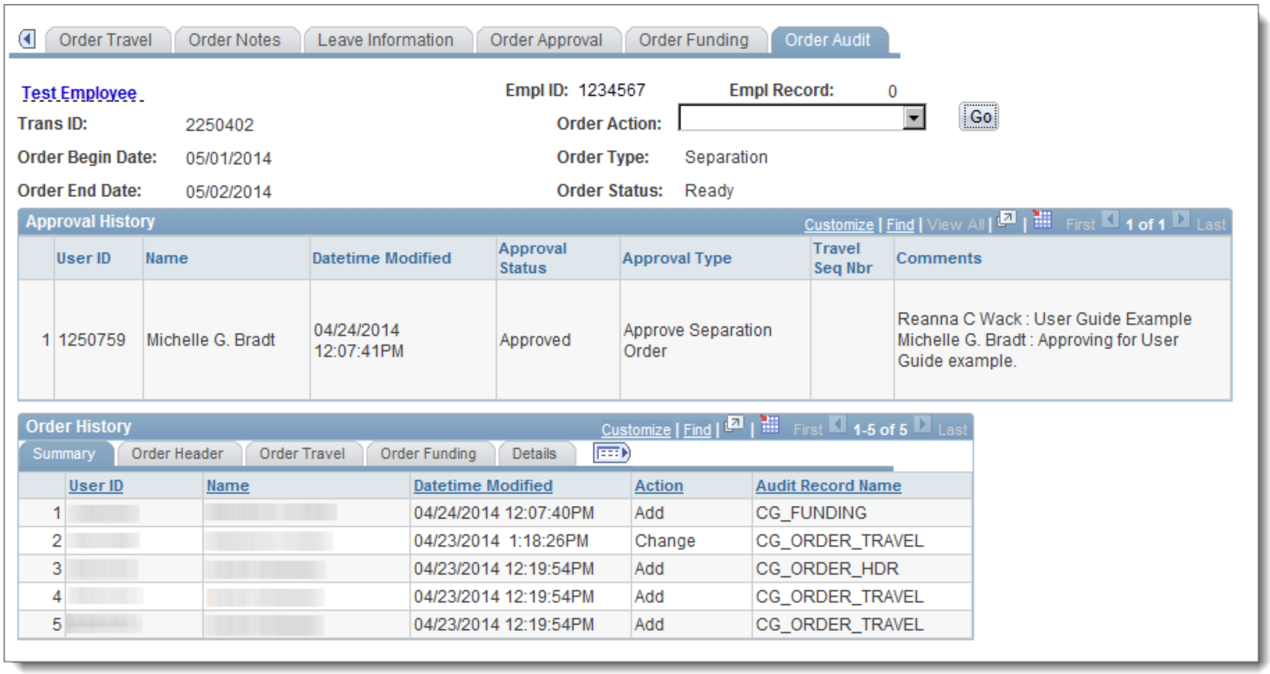


Figure 67: Order Audit Tab

11.0 DD-214 Form

11.1 General DD214 Process Flow in Direct Access

1. SPO updates the Separation Order.

2. SPO creates a DD214 Form (Worksheet). Data from the saved Separation Order, the member's Job Data, Awards, Education and Personal Data is loaded to the DD214 Form page.

3. SPO Technician completes the remaining editable blocks on the DD214 Form page.

4. SPO may Save the Form, exit, then return to continue updating the DD214 Form until it is ready for Supervisor review.

5. SPO may Print a review version for Supervisor.

6. SPO Supervisor reviews prepared DD214, communicates any changes needed to the SPO. SPO may continue to update the DD214 Form.

7. Once the SPO Supervisor is satisfied with the Form, SPO Sup checks 'Final' on the Form.

8. Electronic DD214 will be sent to DMDC upon finalization.

9. SPO no longer has update access to the DD214 Form once it is finalized.

10. The PSC Reissue Branch must initiate any changes needed, using the DD214 Reissue link on the Separations pagelet.

11. SPO users will only be able to view the most recent, previously finalized version of the DD214 Form/Reissue.

12. Version numbers on the search results and the online DD214 page indicate which version the user may update.

11.2 DD214 Form Completion (SPO)

1. From the portal homepage, click the DD214 Form link in the Separation pagelet.

Figure 68: DD214 Form

2. The DD214 Search page finds EmplIDs who have Separation and/or Reserve Orders in an Authorized, Ready or Finished status. SPOs may not add DD214s without an order.

3. Enter the search criteria to access the DD214. [Leave the EmplID field blank to see all members who have a Separation/Reserve Order in Direct Access, for whom the SPO may prepare a DD214.]

4. Select a member/DD214 link from the result list. The DD214 Form will generate.

Once the DD214 Form generates, additions to information on the DD214 will not be copied back to the member's Direct Access records. Any new information added to the DD214 should also be updated in the source Direct Access pages. As an alternative, the SPO should work with the member and update the member's records first (such as Awards, Education, addresses).

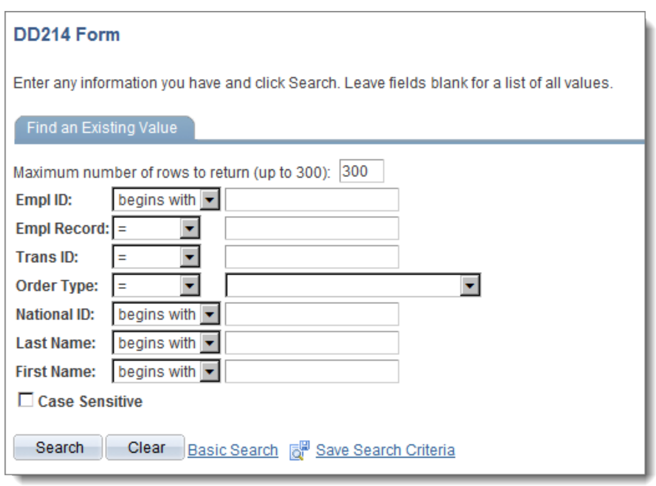
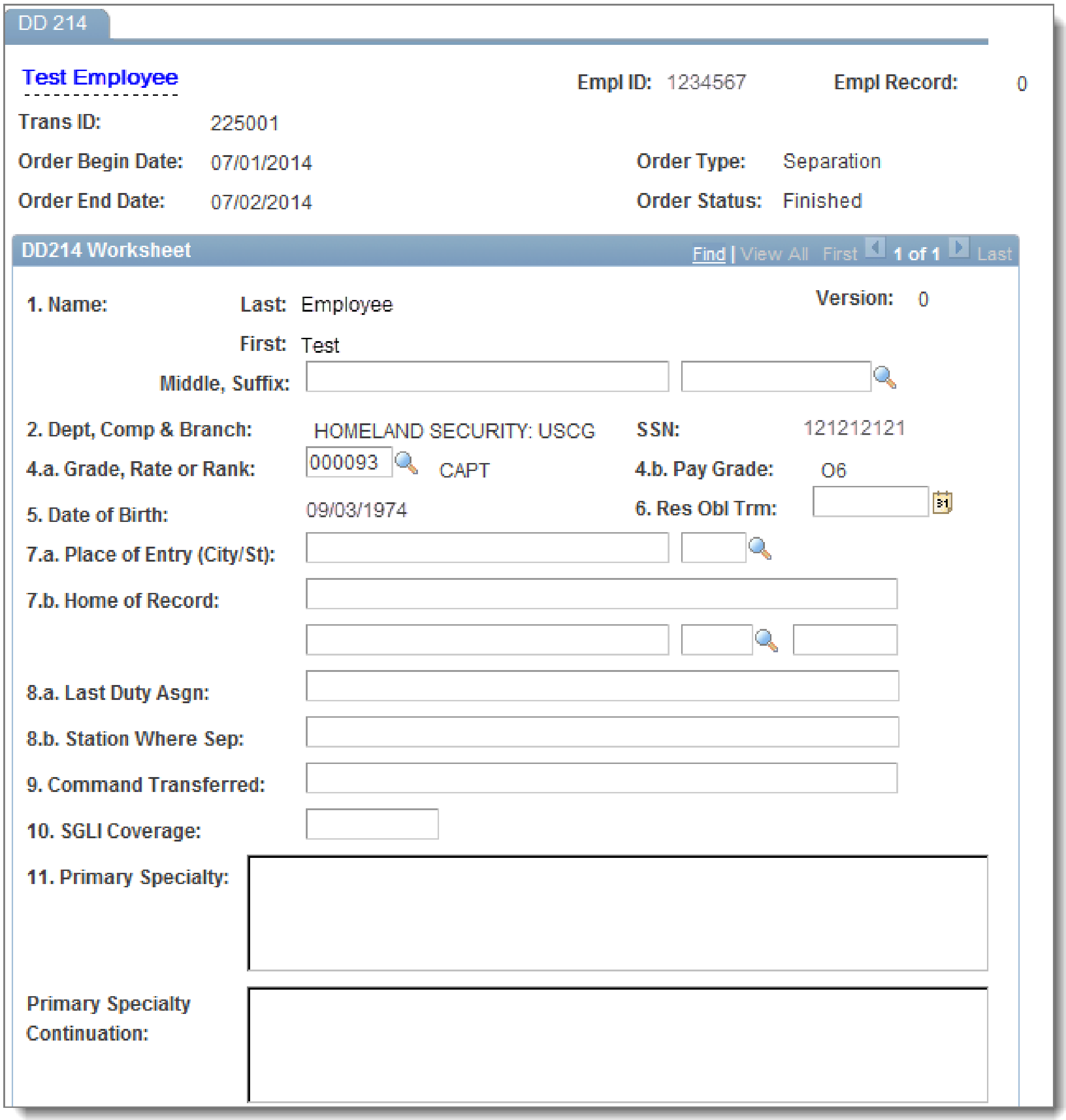


Figure 69: DD214 Search Page



DD 214

Test Employee

Empl ID: 1234567 Empl Record: 0

Trans ID: 225001

Order Begin Date: 07/01/2014 Order Type: Separation

Order End Date: 07/02/2014 Order Status: Finished

DD214 Worksheet Find | View All First 1 of 1 Last

1. Name: Last: Employee Version: 0

First: Test

Middle, Suffix:

2. Dept, Comp & Branch: HOMELAND SECURITY: USCG SSN: 121212121

4.a. Grade, Rate or Rank: 000093 CAPT 4.b. Pay Grade: O6

5. Date of Birth: 09/03/1974 6. Res Obl Trm:

7.a. Place of Entry (City/St):

7.b. Home of Record:

8.a. Last Duty Asgn:

8.b. Station Where Sep:

9. Command Transferred:

10. SGLI Coverage:

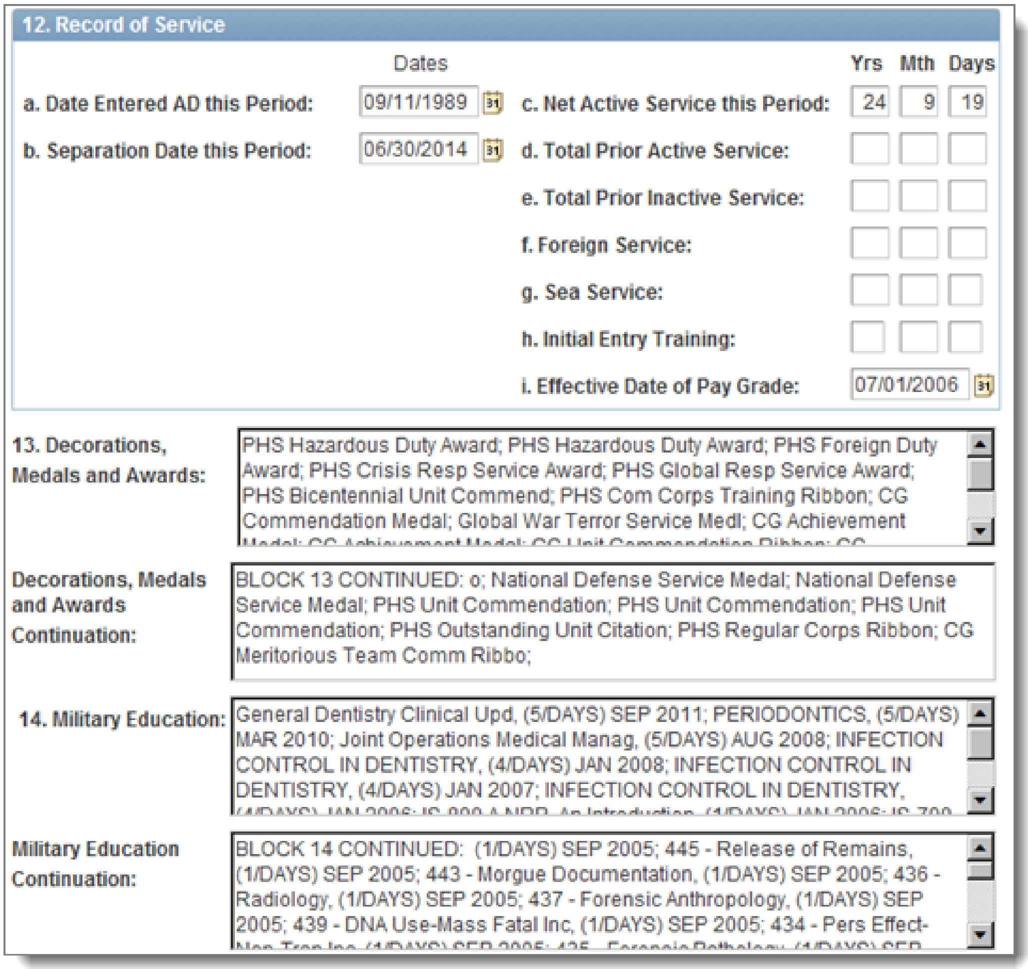
11. Primary Specialty:

Primary Specialty Continuation:

Figure 70: DD214 Form (Partial Page)

5. The DD214 data will be loaded from the member's Job record, Awards and Education records, and the Separation Order. The SPO works with the member to complete the remainder of the DD214 blocks.

6. The SPO may not update the Separation Date field.



12. Record of Service

	Dates		Yrs	Mth	Days
a. Date Entered AD this Period:	09/11/1989	c. Net Active Service this Period:	24	9	19
b. Separation Date this Period:	06/30/2014	d. Total Prior Active Service:			
		e. Total Prior Inactive Service:			
		f. Foreign Service:			
		g. Sea Service:			
		h. Initial Entry Training:			
		i. Effective Date of Pay Grade:	07/01/2006		

13. Decorations, Medals and Awards: PHS Hazardous Duty Award; PHS Hazardous Duty Award; PHS Foreign Duty Award; PHS Crisis Resp Service Award; PHS Global Resp Service Award; PHS Bicentennial Unit Commend; PHS Com Corps Training Ribbon; CG Commendation Medal; Global War Terror Service Medl; CG Achievement

Decorations, Medals and Awards Continuation: BLOCK 13 CONTINUED: o; National Defense Service Medal; National Defense Service Medal; PHS Unit Commendation; PHS Unit Commendation; PHS Unit Commendation; PHS Outstanding Unit Citation; PHS Regular Corps Ribbon; CG Meritorious Team Comm Ribbo;

14. Military Education: General Dentistry Clinical Upd, (5/DAYS) SEP 2011; PERIODONTICS, (5/DAYS) MAR 2010; Joint Operations Medical Manag, (5/DAYS) AUG 2008; INFECTION CONTROL IN DENTISTRY, (4/DAYS) JAN 2008; INFECTION CONTROL IN DENTISTRY, (4/DAYS) JAN 2007; INFECTION CONTROL IN DENTISTRY,

Military Education Continuation: BLOCK 14 CONTINUED: (1/DAYS) SEP 2005; 445 - Release of Remains, (1/DAYS) SEP 2005; 443 - Morgue Documentation, (1/DAYS) SEP 2005; 436 - Radiology, (1/DAYS) SEP 2005; 437 - Forensic Anthropology, (1/DAYS) SEP 2005; 439 - DNA Use-Mass Fatal Inc, (1/DAYS) SEP 2005; 434 - Pers Effect-

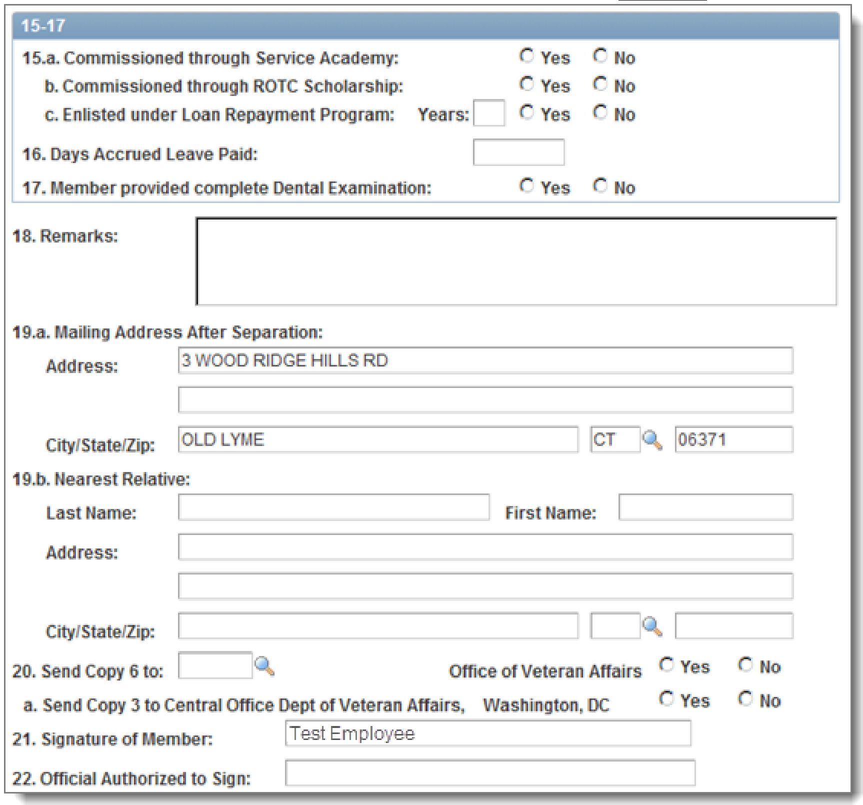
DD214 Form (Record of Service section)

7. The SPO may copy out text from the Decorations and Education blocks to a text editor such as Word or Notepad, update the information, then paste the text back into the block field on the DD214.

8. Continuation Blocks (11, 13, 14): If the text in Blocks 11, 13, or 14 exceeds the character limit in those blocks, the extra text will automatically be inserted into the corresponding Continuation blocks.

- Paste the complete, edited text into the numbered block from a text editor.
- Save the page.
- The system will split the text block between the numbered and Continuation blocks, at exactly the point of the character limit.
- The full text will print correctly on the DD214 form.

Any new information that is added on the DD214, such as Awards and Education, personal information, mailing address, etc., will NOT be copied back automatically to the member's Direct Access records from the DD214. It is best for the SPO to update such information on the member's Direct Access records <u>before</u> the DD214 is created.



15-17

15.a. Commissioned through Service Academy: ○ Yes ○ No

b. Commissioned through ROTC Scholarship: ○ Yes ○ No

c. Enlisted under Loan Repayment Program: Years: ○ Yes ○ No

16. Days Accrued Leave Paid:

17. Member provided complete Dental Examination: ○ Yes ○ No

18. Remarks:

19.a. Mailing Address After Separation:

Address: 3 WOOD RIDGE HILLS RD

City/State/Zip: OLD LYME CT 06371

19.b. Nearest Relative:

Last Name: First Name:

Address:

City/State/Zip:

20. Send Copy 6 to: Office of Veteran Affairs ○ Yes ○ No

a. Send Copy 3 to Central Office Dept of Veteran Affairs, Washington, DC ○ Yes ○ No

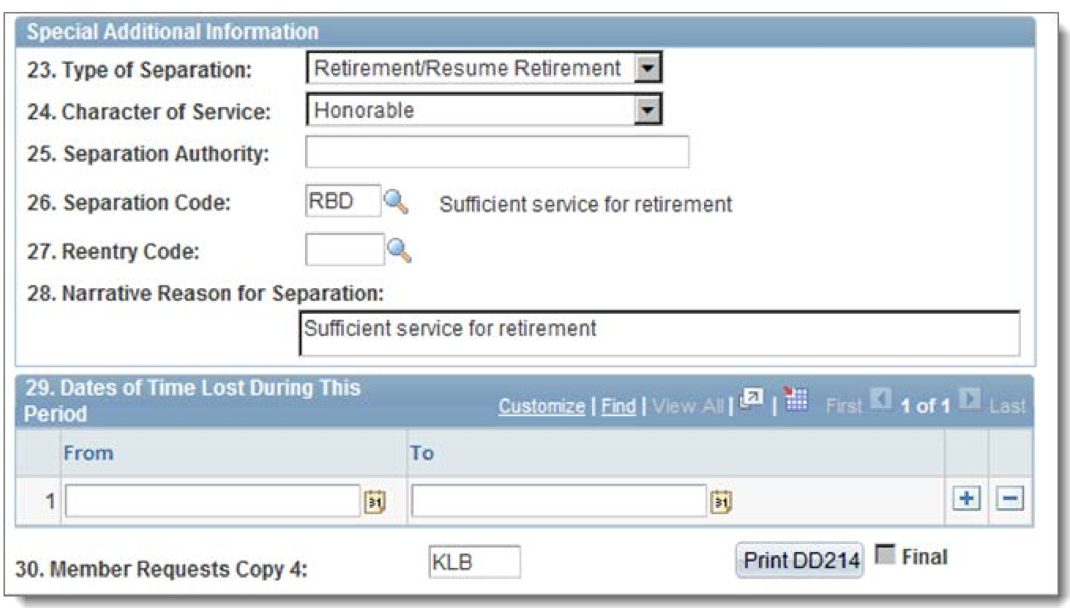
21. Signature of Member: Test Employee

22. Official Authorized to Sign:

<u>DD214 Form (Blocks 15 – 22)</u>

9. Continue to fill the Special Additional Information block.

10. Save the DD214 Form page periodically. The SPO may Save, close, and return to update the un-finalized DD214 as often as necessary, until the SPO Supervisor clicks Final.



Special Additional Information

23. Type of Separation: Retirement/Resume Retirement

24. Character of Service: Honorable

25. Separation Authority:

26. Separation Code: RBD Sufficient service for retirement

27. Reentry Code:

28. Narrative Reason for Separation: Sufficient service for retirement

29. Dates of Time Lost During This Period — Customize | Find | View All | | First 1 of 1 Last

	From	To
1		

30. Member Requests Copy 4: KLB — Print DD214 — Final

Figure 71: Special Additional Information block

11.3 Order Updates Flow to DD214

Until the DD214 is finalized, any updates to the Separation Order will automatically flow onto the corresponding DD214 block. If a field on the DD214 requires changes, and the SPO does not have access to update it, it is because it must be updated on the Separation Order first.

11.4 Printing a Review Copy

Save the DD214 Form page before printing a review copy.

To print the DD214, click on the **Print** button to create a review copy. .

The review copy of the DD214 is not the final version, and cannot be transmitted to DMDC until the SPO Supervisor checks the Final checkbox.

11.5 Finalizing the DD214 (SPO Supervisor)

Once the DD214 has been fully completed, the SPO may print the DD214 for the SPO Supervisor's review and Final approval.

To finalize the DD214:
- SPO Supervisor opens the member's online DD214 Form.
- Check the Final checkbox. Only the SPO Supervisor has this ability.
- Click Print DD214. This outputs the final version of the DD214.

Figure 72: Print DD214

This action also initiates an electronic DD214 transmission to DMDC.

Once the SPO Supervisor finalizes the DD214, the SPO cannot make any further changes to the DD214. The SPO may view and Print copies of the *most recent* version of a DD214.

If changes to the DD214 are required after finalization, PSC must initiate the DD214 Reissue process in Direct Access. This is explained in section **12.6 DD 214 Reissue.**

11.6 Corrections to Separation Request, Separation Order, and DD214 After DD214 Finalization/DMDC Transmit

Communication and coordination between the Member, SPO and PSC is critical.

If a correction is needed to data on the Separation Request, PSC Separations Branch should make the change and notify the SPO if the change to the Separation Request impacts the Separation Order.

If a correction is needed to the Separation Order, the SPO should make the change to the order. Any changes will flow automatically to the DD214 before it is finalized.

If the updated Order will affect information on the finalized DD214, notify the PSC DD214 Reissue branch. The Reissue Branch must initiate a Reissue version of the DD214 using Direct Access.

11.7 DD 214 Reissue

This component may be used in the following scenarios:

- A previously finalized, initial DD214 requires changes and SPO does not have access to update the DD214.
- The member needs a new or replacement DD214 that is not linked to a Separation Order.

11.8 DD214 Reissue of an Existing DD214 (updated version)

Only users with a DD214 Reissue role may initiate a Reissue of an existing DD214, to make changes needed on a Finalized DD214. These users have a security role that allows access to this page. The Reissue actually creates a new version number of the initial DD214.

1. Click the **DD214 Reissue** link on the Separations pagelet.

2. Search for the initial DD214 by EmplID.

The initial DD214 page displays as Version 0 (or the most recent #).

3. To create a Reissue DD214, click the **+** symbol. This adds a new DD214 row (version# +1) to the page.

4. The user performs any edits needed, then Saves the DD214.

If the Reissuer wants to continue editing an un-Finalized, saved Reissue, the user must access the record via the DD214 Reissue menu link, not the DD214 Form link.

5. User must check the Final button to send the new version to DMDC.
6. Reissuer may Print a copy of the Reissued DD214

Clicking the Final checkbox will initiate an electronic DD214 reissue transmission to DMDC.

No further edits to the DD214 Reissue will be allowed, once it is Finalized. Any further changes require creation of a new DD214 version/reissue, repeating the Finalization and Print processes.
Delivery of the reissued DD214 to the member is accomplished via business process.

The SPO and PSC will be able to View and Print only the most current version (original or reissued) of a given DD214 via the DD214 Form link.

11.9 Issuing DD214s Without Separation Orders

The business case is a need to issue 'replacement' or 'missing' DD214s to document active duty, when no Separation Order was issued.
Only Reissuer role users may create a DD214 without a Separation Order. SPO role users may not perform this function.

User accesses the **DD214 Form** link to Add a new DD214.

Search by the EmplID, not the Order/Trans ID.

A new DD214 page opens.

The TransID number will start with '1' . This number, plus the EmplID, are the unique keys of the DD214.

User completes the DD214 page.

The Header section for a DD214 without a TransID does not have Order data; only Status (always Finished).

The Special Additional Information block is editable on this DD214, whereas it is not on a Order-related DD214. The user must supply this information since it is not flowing from an order.

If the user needs to go back to edit an *un-finalized* DD214 without an order, search for the DD214 from the **DD214 Reissue** link. It cannot be accessed from the **DD214 Form** link.

User must submit the new DD214 to a SPO Sup role user for Finalization.

After the DD214 is Finalized, the SPO may view (only) the form using the **DD214 Form** link.

11.10 Generate a DD214 for Short-Term Reserve Orders

When a member finishes a short term Reserve Order, the member may be entitled to receive a DD214. In this case, the SPO user may create a DD214 based on the Reserve Order.

Click the DD214 Form hyperlink on the Separations pagelet, then follow the steps in the DD214 Form Completion section. Search for the member's orders by EmplID. You may filter the search results by the Order Type field, using value 'Reserve Order.' Be sure to select the appropriate Reserve Order from the results list to open a new DD214 Form. Complete the form as described above.

12.0 Orders Integration Process

This process creates JOB rows, based on approved Separation Orders. The process will be scheduled to run nightly as a 'batch' process, without user intervention. If needed, authorized users may run the process manually for a specific order number or Employee ID. The process looks for approved Orders up to 4 days prior to the Separation Effective date.

1. Use the left-side menu to navigate to Separations > Orders Processing.

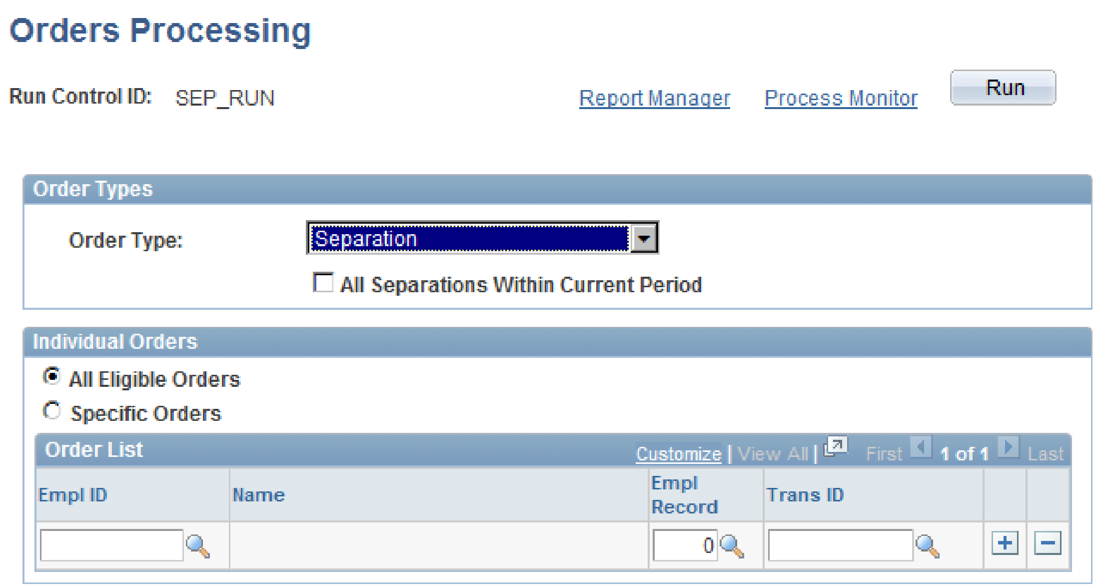


Figure 73: Orders Integration Process

2. Select 'Separations' as the Order Type.
- Select **'All Separations Within Current Period'** option prior to finalizing end month on cycle. Any retirements for first of following month will be picked up, regardless of number of days out from current date.

3. Click 'Specific Orders' to process only one order.

4. Enter the EmplID, then look up the TransID and select the Order number from the list. Both the EmplID and TransID (Order) are required.

5. You may add rows to select additional EmplIDs, if needed.

6. Click Run.

7. The Process Monitor log file will show the results when the process completes.

12.1 Integration Process Results

JOB Data Insert

- A JOB row is created with Action/Reason according to Separation Type configuration.
- Job row will be written based on date rules and Action Reason configuration for the type of separation.
- If a future dated job row exists, no job row will be written.
- If a row for this type of separation already exists on the specified date, no row will be written.

Order Updates

- The Separation Order Status is set to 'Finished.'
- If the Separation Type was a RELAD, the process also updates the Reserve Order to 'Finished' and sets the Reserve Order End Date equal to the Separation Effective Date.

Payroll Updates

The integration process prepares the Payroll calendars to process the member's final pay, paid leave, and any additional pays.

Please review the next section of this manual, 'Separations and Payroll Cycles' for more information on this topic.

13.0 Separations and Payroll Cycles

This section explains how the Separation Order integrates with the Payroll Cycle calendars, to update the separating member's pay. Upon separation, the member's regular pay must be cancelled from future pay cycles, and any additional separation pays, gratuities, and leave payouts must be processed as final payments.

13.1 Order Integration Process

The Separation Order Integration process will run prior to every business day. The process creates updates to both the On- and Off-Cycle payroll calendars to accomplish the separation payroll changes. The Integration process log file indicates the actions taken on the separating member:

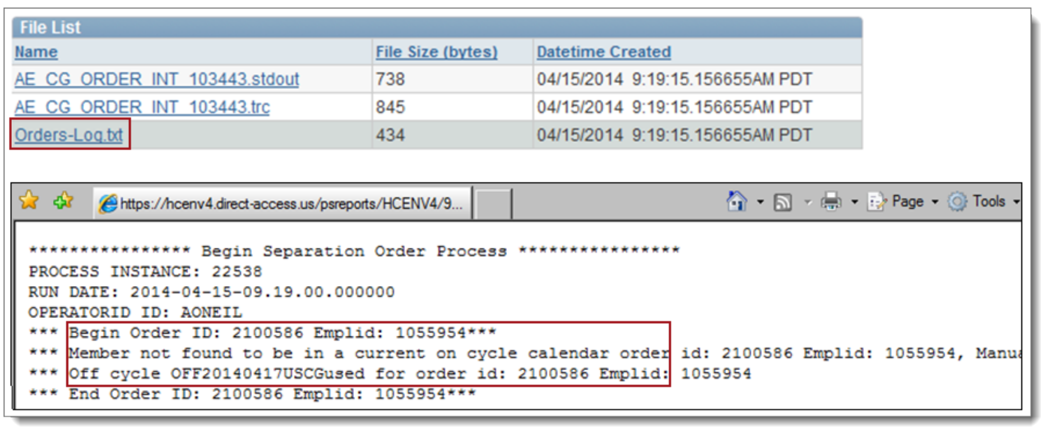


Figure 74: Orders Integration Process

13.2 One Time Positive Input Elements

Any Lump Sum Leave, Separation Pay, Discharge Gratuity, or Disability Separation Pay elements the member may receive will be added as One Time Positive Input entries to the On Cycle calendar, by the Integration Process.

- You may verify or update the OTPI entries using this navigation:
  Global Payroll and Absence Management > Payee Data > Assign Earnings and Deductions > One Time (Positive Input)
- Pay and Leave Elements will be added in the Earnings and Deductions Grid.

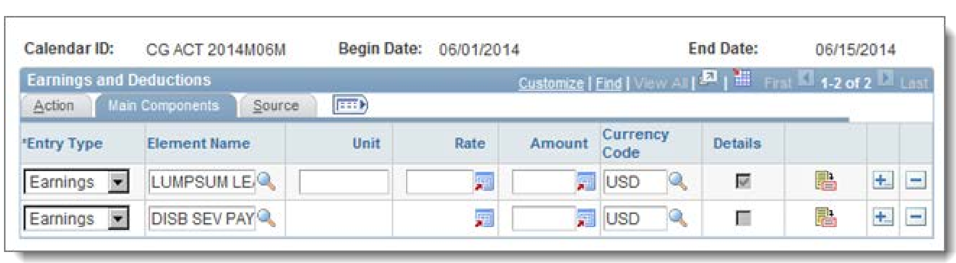


Figure 75: One Time Positive Input Elements

13.3 Supporting Elements Detail

Details for the added elements may be displayed. Click the icon pictured below to open the details window.

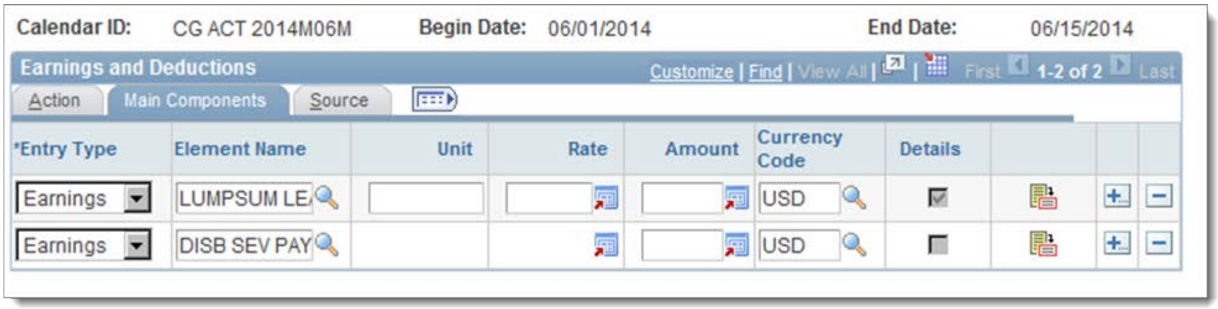


Figure 76: Opens Supporting Elements Detail Box

Lump Sum Leave
Click the Details icon to view Lump Sum Leave supporting elements:

Figure 77: Lump Sum Leave

- Type = Separation
- Leave Days Sold = Leave Days paid out (Balance – forwarded leave)
- Forwarded Separation Leave = Leave days carried over

Separation Pay
Click the Details icon to view detail of any Separation Pay elements:

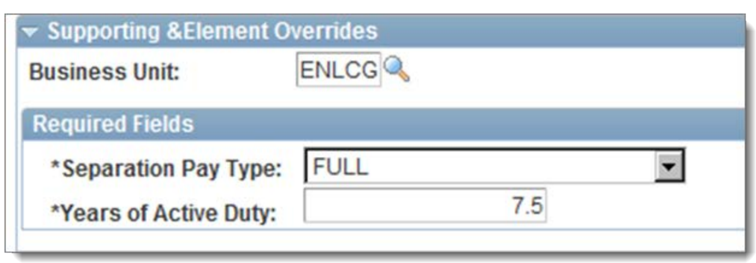


Figure 78: Separation Pay

- Pay Type: Full or Half authorized in separation authorization

- Years of Active Duty: 7.5 (7 years, 6 months)

13.4 Death Gratuity

If a death gratuity is processed with the final payment, it should be manually inserted as a One Time Positive Input, as part of the On Cycle.

- Click the + to add a row in the Earnings and Deductions grid.
- Select the Element Name ‘DEATH GRAT’ from the lookup tool.
- Save the page to finish creating the new element.

Figure 79: Death Gratuity

- A Death Gratuity has no supporting elements.

13.5 On-Cycle Calendar Updates

To stop the member’s regular pay, in the On-Cycle pay calendar, the Orders Integration process sets the member’s Calculation Status ‘Cancel.’

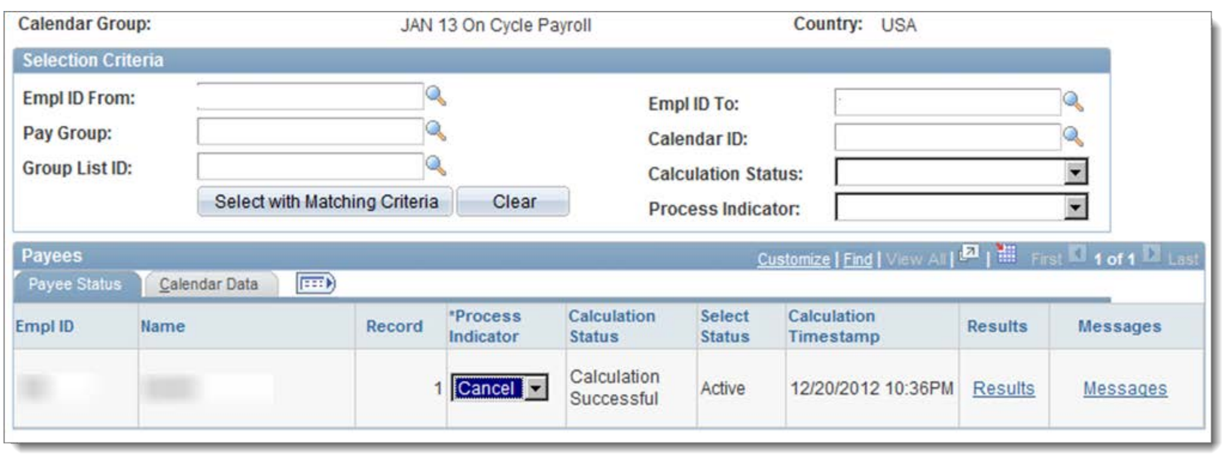


Figure 80: Cancelling the Member From On-Cycle Pay

- On cycle calendar updates will be noted in the Orders Integration process order-log.txt log file
- If an on cycle is <u>not</u> identified for the member, this will also be noted in the order-log.txt log file.

13.6 Off-Cycle Pay Calendar Updates

The Orders Integration Process will also update the Off-Cycle Pay Calendar. An off-cycle will be created and processed for every business day.

The separating member will be added as a payee to the appropriate Off-Cycle calendar id.

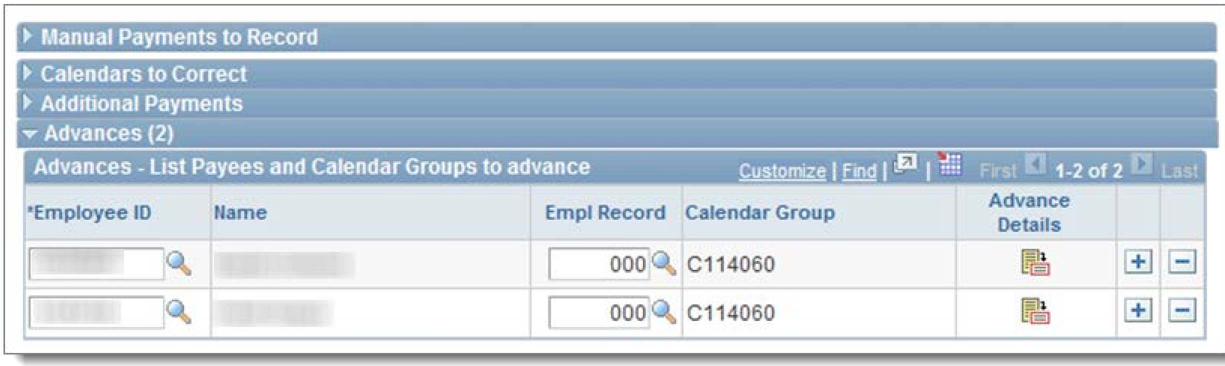


Figure 81: Off-Cycle Pay Calendar Updates

If necessary, the user may manually add a payee to an off-cycle calendar.

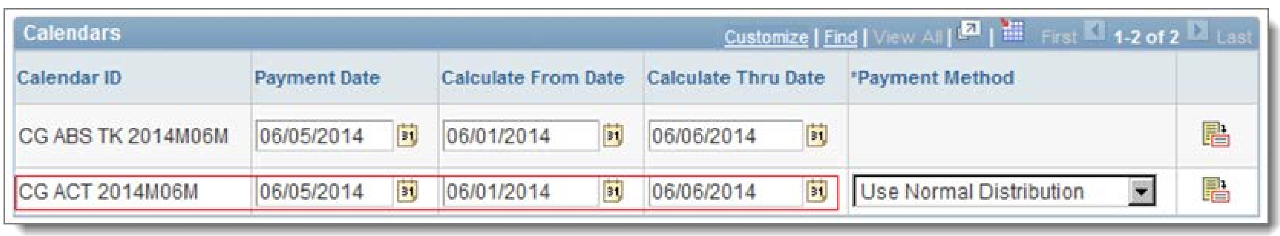


Figure 82: Manually Add Payee

- Calculation From Date = Pay Period Begin Date
- Calculation Thru Date = Separation Date specific to the member.

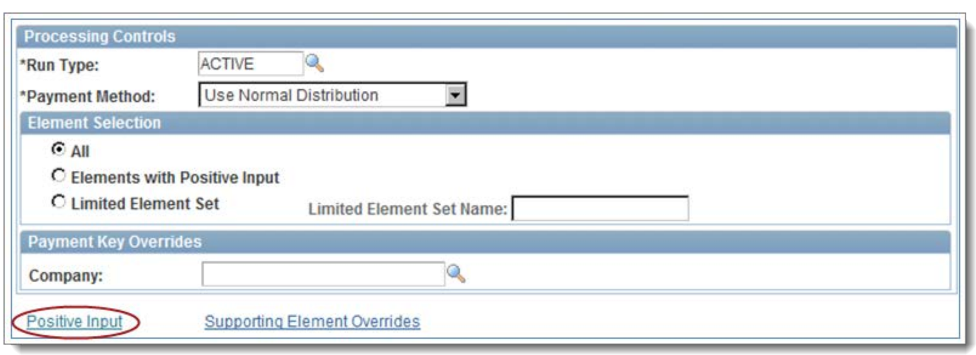


Figure 83: Positive Input

When the Off-Cycle pay runs, it will ‘pick up’ any One Time Positive Input pay elements created for the payee and process those payments, according to the calendar calculation dates.

14.0 Separations Reports & Queries

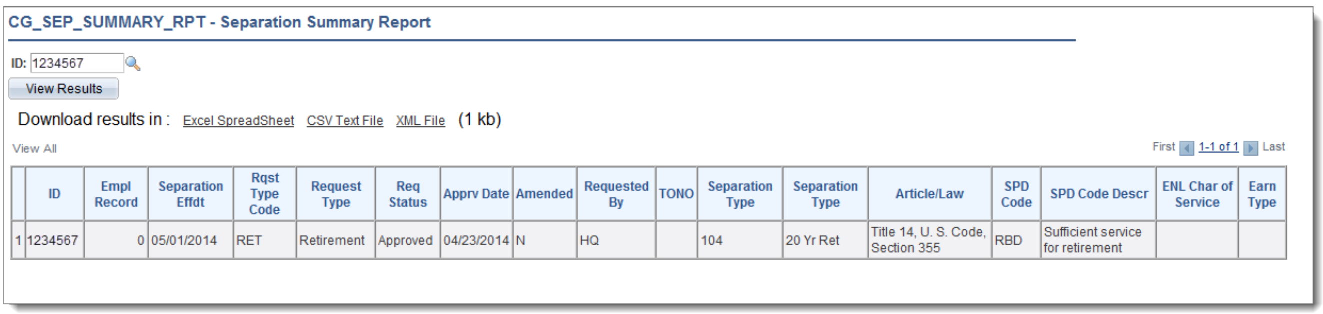
To access Separations reports, from the portal homepage, go to the Separations pagelet and select a link for the report.

14.1 Separation Summary Report

This report displays one member's separation summary. If the member has multiple separations, they will all be listed.

1. Enter the EmplID.

2. Click View Results. The results can be saved to Excel, a CSV file or HTML file.



CG_SEP_SUMMARY_RPT - Separation Summary Report

ID: 1234567

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)

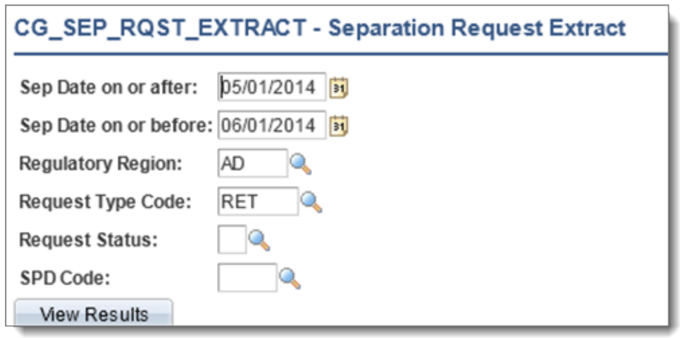
View All First 1-1 of 1 Last

	ID	Empl Record	Separation Effdt	Rqst Type Code	Request Type	Req Status	Apprv Date	Amended	Requested By	TONO	Separation Type	Separation Type	Article/Law	SPD Code	SPD Code Descr	ENL Char of Service	Earn Type
1	1234567	0	05/01/2014	RET	Retirement	Approved	04/23/2014	N	HQ		104	20 Yr Ret	Title 14, U. S. Code, Section 355	RBD	Sufficient service for retirement		

Figure 84: Separations Summary Report

14.2 Separation Request Extract

This report provides details of Separation Requests, by Separation dates. SPOs may use this report to view data entered by PSC. The results can be filtered further by entering more search criteria.



Separation Request Extract Criteria

1. Enter the Sep Date on or After.

2. Enter the Sep Date on or Before.

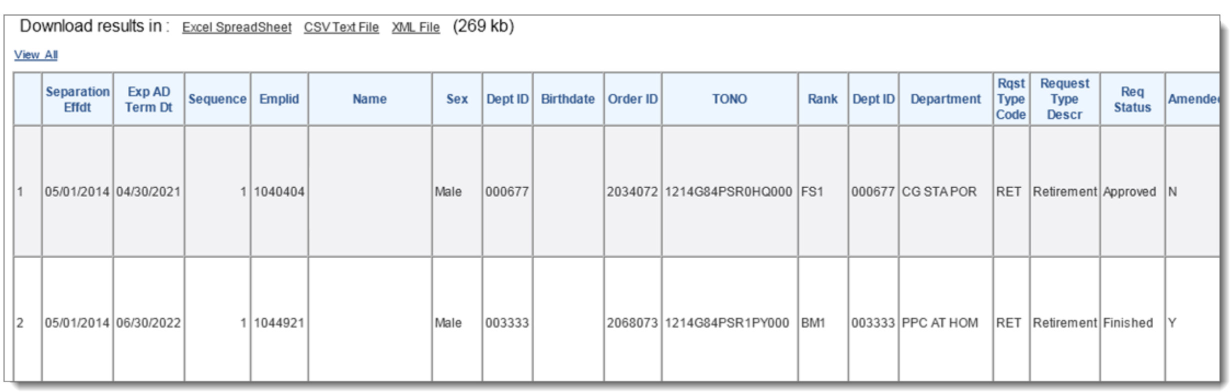
3. Enter the Regulatory Regions (optional).

4. Enter the Request Type Code (optional).

5. Enter the Request Status (optional).

6. Enter the SPD Code (optional).

7. Click View Results. The results can be saved to Excel, a CSV file or an HTML file.



Download results in : Excel SpreadSheet CSV Text File XML File (269 kb)

View All

	Separation Effdt	Exp AD Term Dt	Sequence	Emplid	Name	Sex	Dept ID	Birthdate	Order ID	TONO	Rank	Dept ID	Department	Rqst Type Code	Request Type Descr	Req Status	Amended
1	05/01/2014	04/30/2021	1	1040404		Male	000677		2034072	1214G84PSR0HQ000	FS1	000677	CG STA POR	RET	Retirement	Approved	N
2	05/01/2014	06/30/2022	1	1044921		Male	003333		2068073	1214G84PSR1PY000	BM1	003333	PPC AT HOM	RET	Retirement	Finished	Y

Figure 85: Separation Request Extract

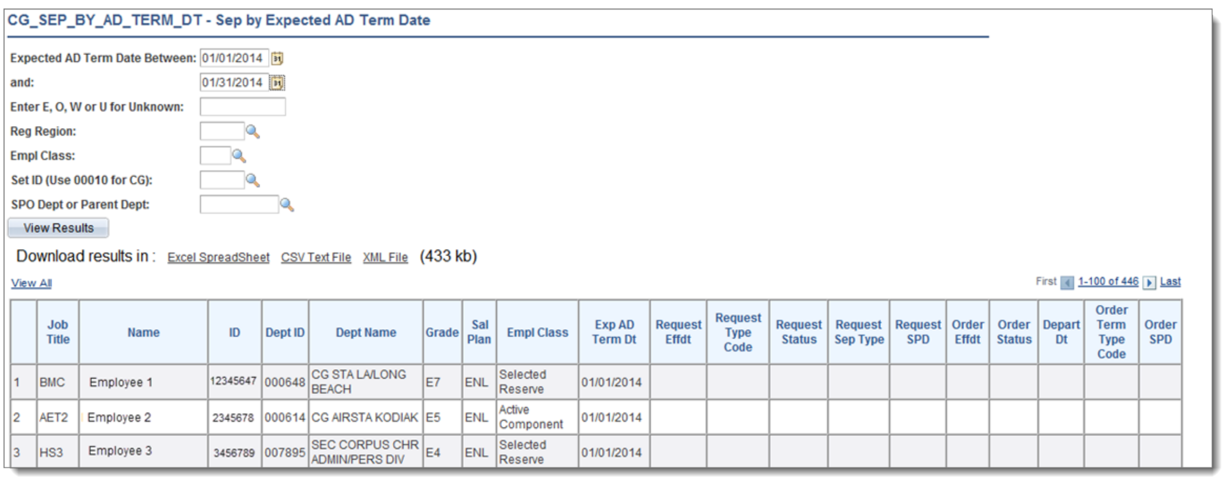
14.3 SEP By Expected AD Term

This report searches for members by the Expected AD Term date. If a Separation record exists, that data will show in search results.

1. Enter the Expected AD Term Date Between [date] and [date].

The criterion below is optional and can be used for additional filtering:

- Enter the Reg Region (AD for Active Duty), or look up another Region.
- Enter the Empl Class.
- Enter the Set ID. Suggested: 00010 for Coast Guard only.
- Enter the SPO Department or Parent Department.
- Click View Results. The results of this report can be saved to Excel, a CSV file or an HTML file.


CG_SEP_BY_AD_TERM_DT - Sep by Expected AD Term Date

Expected AD Term Date Between: 01/01/2014
and: 01/31/2014
Enter E, O, W or U for Unknown:
Reg Region:
Empl Class:
Set ID (Use 00010 for CG):
SPO Dept or Parent Dept:
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (433 kb)

View All

First 1-100 of 446 Last

	Job Title	Name	ID	Dept ID	Dept Name	Grade	Sal Plan	Empl Class	Exp AD Term Dt	Request Effdt	Request Type Code	Request Status	Request Sep Type	Request SPD	Order Effdt	Order Status	Depart Dt	Order Term Type Code	Order SPD
1	BMC	Employee 1	12345647	000648	CG STA LA/LONG BEACH	E7	ENL	Selected Reserve	01/01/2014										
2	AET2	Employee 2	2345678	000614	CG AIRSTA KODIAK	E5	ENL	Active Component	01/01/2014										
3	HS3	Employee 3	3456789	007895	SEC CORPUS CHR ADMIN/PERS DIV	E4	ENL	Selected Reserve	01/01/2014										

Figure 86: SEP by Expected AD Term

14.4 Separations Order Extract Report

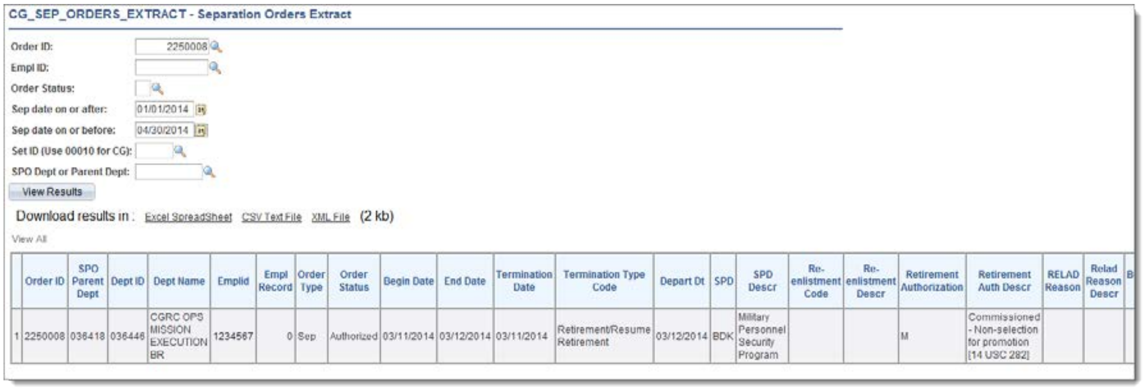
This report provides a list of existing Separation Orders based on the dates entered. The results can be filtered further by filling in the remainder fields

1. Enter the Sep Date on or after. (Required

2. Enter the Sep date on or before. (Required)

3. To filter the results further, enter additional criteria.

4. Click View Results. The results can be saved to Excel, a CSV file or an HTML file.



CG_SEP_ORDERS_EXTRACT - Separation Orders Extract

Order ID: 2250008
Empl ID:
Order Status:
Sep date on or after: 01/01/2014
Sep date on or before: 04/30/2014
Set ID (Use 00010 for CG):
SPO Dept or Parent Dept:
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (2 kb)

View All

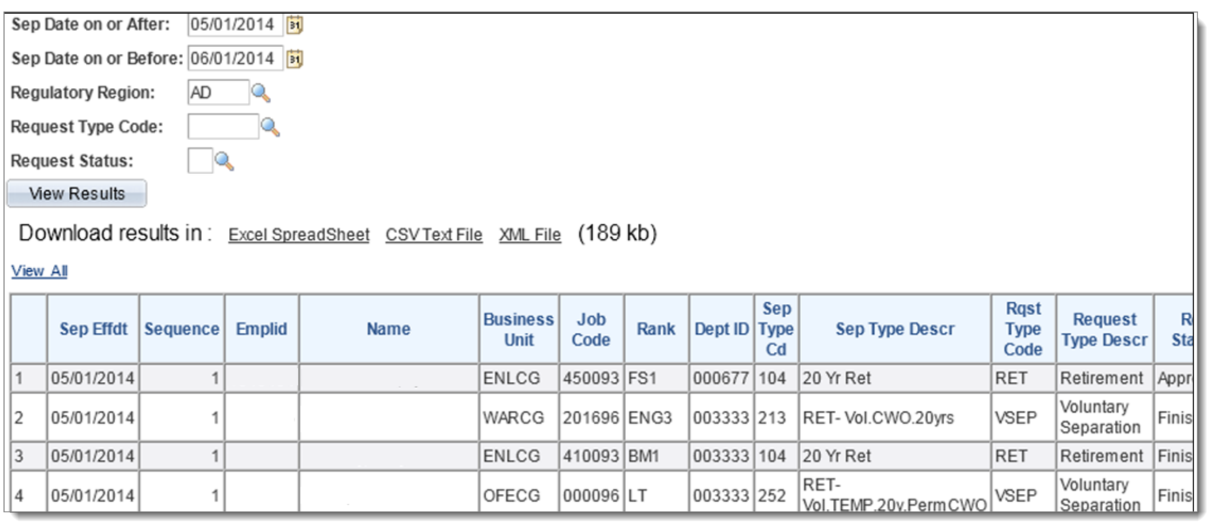
	Order ID	SPO Parent Dept	Dept ID	Dept Name	Emplid	Empl Record	Order Type	Order Status	Begin Date	End Date	Termination Date	Termination Type Code	Depart Dt	SPD	SPD Descr	Re-enlistment Code	Re-enlistment Descr	Retirement Authorization	Retirement Auth Descr	RELAD Reason	Relad Reason Descr	B
1	2250008	036418	036446	CGRC OPS MISSION EXECUTION BR	1234567	0	Sep	Authorized	03/11/2014	03/12/2014	03/11/2014	Retirement/Resume Retirement	03/12/2014	BDK	Military Personnel Security Program			M	Commissioned - Non-selection for promotion [14 USC 282]			

Figure 87: Separations Order Extract Report

14.5 Separation Requests by Status

This report finds existing Separation Requests by Request Status. Use it to find whether PSC has initiated a Sep Request for a member.

1. Enter the Sep Date on or after. (Required)
2. Enter the Sep date on or before. (Required)
3. Enter the Reg Region (AD for Active Duty), or look up another Region.
4. Enter the Request Type (optional).
5. Enter the Request Status (optional).
6. Click View Results. The results of this report can be saved to Excel, a CSV file or an HTML file.



Sep Date on or After: 05/01/2014
Sep Date on or Before: 06/01/2014
Regulatory Region: AD
Request Type Code:
Request Status:
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (189 kb)

View All

	Sep Effdt	Sequence	Emplid	Name	Business Unit	Job Code	Rank	Dept ID	Sep Type Cd	Sep Type Descr	Rqst Type Code	Request Type Descr	R Sta
1	05/01/2014	1			ENLCG	450093	FS1	000677	104	20 Yr Ret	RET	Retirement	Appr
2	05/01/2014	1			WARCG	201696	ENG3	003333	213	RET- Vol.CWO.20yrs	VSEP	Voluntary Separation	Finis
3	05/01/2014	1			ENLCG	410093	BM1	003333	104	20 Yr Ret	RET	Retirement	Finis
4	05/01/2014	1			OFECG	000096	LT	003333	252	RET- Vol.TEMP.20y.PermCWO	VSEP	Voluntary Separation	Finis

Figure 88: Separation Request by Status